InfoGuru
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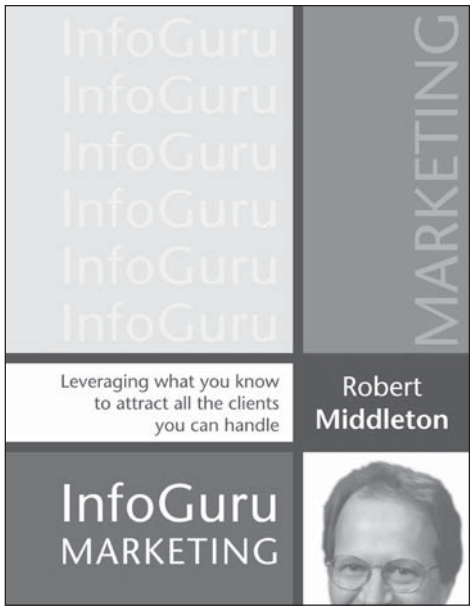
MARKETING

Leveraging what you know
to attract all the clients
you can handle

Robert
Middleton

InfoGuru
MARKETING



InfoGuru Marketing Manual
2nd Edition - 10/14/05

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Cover Design and Page Layout : Deborah Rutti, Network Galleries

Printed in the United States

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Introduction

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A Practical Guide to Better Marketing

Wouldn't it be great if you knew how to attract all the clients you could handle? And wouldn't it be wonderful if you attracted the right kind of clients — clients who were great to work with, who paid good fees for your services and referred you to other clients?

Being an InfoGuru is to be on the leading edge of the information business explosion. It's all about leveraging that information to grow your business. By marketing yourself as an InfoGuru you'll be successful at attracting all the clients you'll ever need.

There is nothing theoretical in this manual. There's not one single thing here that I or my clients haven't done successfully. These are things you can actually do. And the great thing is, most of them cost very little money or nothing at all.

Before you get into the manual, here are a few things you should know.

Get the most out of the manual

This manual is written like a course. In fact, this manual has been used in a somewhat different form for my Marketing TeleClasses. I've added more information, how-tos, stories and action plans so that you can apply the information one step at a time.

Work on one chapter at a time. Follow the Action Plans throughout each chapter and you'll start seeing results immediately in your marketing effectiveness.

If you read this manual like you read most books you won't get much out of it.

Don't:

Just read it on the screen

Quickly skim through the material

Fail to work on the Action Plans

Assume something won't work before you've tried it.

Do:
Work on one chapter at a time.
Take time to think about the ideas.
Write down your thoughts and ideas.
Try out your ideas – put them into action.
Refine your ideas to make them work even better.

I've tried to make this manual approachable and non-intimidating. After all, I'm just like you. I started my consulting practice over 19 years ago and didn't have a clue about marketing myself! This is the distilled wisdom from many years of trial and error. I also realize there are other good resources, such as books, that can supplement this manual, and I've listed them at the end of each chapter with links to my bookstore.

Other important resources

Resources – Online links to many valuable marketing resources such as articles and web and email tools. Also links to literally hundreds of other marketing articles online.
Articles – A collection of over 90 articles on InfoGuru Marketing taken from my eZine collection and organized by the year they were published. There's lots of ideas here not included in the main manual.
Goodies Section – A collection of bonus reports and e-books. Already there's more information in the Goodies Section than the whole InfoGuru Manual itself! I'll be adding to this section regularly.
Audio Files – Links to talks I've given on marketing. You can listen to them right on your computer with RealAudio. I'll be adding to this section frequently, so check back.
InfoGuru Support Forum – An online marketing discussion group exclusively for InfoGuru Manual owners. Get answers to any marketing question.

Become an Action Plan Affiliate

If you think this manual is worthwhile, you are welcome to become an affiliate of Action Plan Marketing. By placing a link on your site, visitors will come to the Action Plan Marketing site to order the manual. Every time a manual or other product on our site is sold, you receive a commission of 30% per sale. For complete details go here.

Give me feedback

If you feel that something in this manual could be improved or made clearer, please let me know. If you can think of things that should be included, also let me know. My goal is to make this manual the most useful resource you've ever used for marketing yourself. Just email me at infoguru@actionplan.com.
Again, congratulations on purchasing the InfoGuru Online Marketing Manual. May it serve to help you grow your business for years to come.

Robert Middleton

Chapter 1

Marketing Yourself as an InfoGuru

Why do we dislike marketing ourselves?

One of the first things I ask participants in my talks and workshops is "What do you hate about marketing?" I get many answers. Some of the most common are:

Don't like being rejected

Takes too much time

Don't know where to start

Don't know what to do

It doesn't work anyway

It feels like I'm just trying to hustle business

Think business should just come to me

I'm sure these sound familiar to you. Over the years I've worked with hundreds of small business people and independent professionals, and I've heard these over and over. The main conclusion I've come to is that independent professionals hate marketing because what they are doing really doesn't work very well.

I became a marketing consultant because I found it fun and challenging. I read a lot of books by the top marketing experts and I started to try all kinds of marketing ideas with my clients. Some flopped spectacularly, some worked so-so and some were triumphs. What was puzzling is that usually I didn't understand exactly why some things worked and why others didn't work.

I broke marketing down into strategies, techniques and skills. I started to build a repertoire of those that I knew would work. For instance, once I helped an Internet Service Provider with a mailing. Previously he got 6 responses. My mailing got 175 responses. I worked with an executive recruiter who struggled to attract clients. We implemented one strategy and she doubled her business in a little over a year. I used several strategies myself that grew my business from nothing to bursting at the seams.

I had many successes like this over the years. I was getting better at what I did and was helping more people but I always wasn't sure why the things that worked

worked! You might say I was looking for a **"unified field theory of marketing"** – some principle, that if you applied it to every marketing situation, would always work to attract clients.

One day, in the shower (of course), it hit me. What all my successful strategies had in common was that they were based on **Solutions** and **Information**. For the Internet Service Provider, that was a booklet that promised to "Untangle the Internet." For the executive recruiter it was a unique search process that guaranteed their satisfaction. For me it was giving talks with a focus on attracting new clients. In every case we were offering ideas and information that promised a desired solution to their problems.

I realized that focusing primarily on solutions and information could be leveraged to attract new clients. For the most part, as I'll demonstrate in this manual, most of us don't market using solutions and information. We market commodities, features and processes. We don't explain **what clients get** from working with us, we explain **what we do**. People are profoundly interested in what they might get and profoundly uninterested in what you happen to do!

What our prospects are looking for is the promise of a solution to a nagging problem, pain or predicament. What they want information on is how that problem, pain or predicament can be resolved once and for all. By providing good solid information about the solutions we provide, our prospects can put themselves in the place of our past clients and see themselves getting the same kind of results.

So I called this principle the InfoGuru Marketing Principle. We are Information Gurus. We give some of that solution-based information away to leverage our credibility as Independent Professionals. And the more we give away, the more we are perceived as partners that prospective clients want to do business with.

Let's look at "getting" a little more closely

Your marketing doesn't work because you are trying to GET something. Your attention and activities are focused on trying to get clients to work with you. And paradoxically, in trying to get clients, you actually push them away.

Let's look at some of the dynamics of typical marketing activities that work against you. First, you're in a condition of need because you're short of business. It's hard to hide that. The feeling of neediness, even desperation is apparent to everyone. When you're needy, your focus is on you and you tend to talk a lot about what you HAVE or what you can DO or what you KNOW.

At networking meetings, in calls to past clients, even in letters, it's all about you and your services. You fail to remember that everyone else, including your prospective clients, are also preoccupied with themselves and frankly don't care much about what you HAVE or can DO or KNOW. In fact they're downright indifferent about you!

No wonder you're feeling a lot of rejection and don't enjoy marketing yourself. No one shows much interest or asks useful questions about your service. Nobody returns your calls or replies to your mailings. It's perfectly understandable that you're starting to think marketing is a complete waste of time.

It gets even worse. The more of this unproductive, you-centered marketing you do, the more discouraged and cynical you get. You not only start believing that marketing is a waste of time and that self-employment is a cruel joke, but you begin to adopt a negative attitude to life in general and to business in particular. Perhaps you're saved by that last minute phone call from an old client, but when this roller coaster process keeps repeating itself, you seriously wonder if you can hang in for the long-haul. Many give up before success strikes.

But there is hope! This manual tells you exactly what to do to attract new clients consistently. To make this work you're going to have to start thinking differently and then taking actions consistent with that new thinking. And I need to warn you that thinking in a new way can be uncomfortable. It can be hard work. It can be confusing and even frustrating. InfoGuru Marketing might seem counter-intuitive. After all, we have so many fixed stereotypes about marketing and selling. We think they're true, but they're not. For instance, I'll bet you didn't know...

It's better to tell a prospective client the problems with your services up front.

That long copy in brochures works a lot better than short bullet-pointed copy...

That speaking about your services in terms of a problem is more powerful than speaking in terms of a solution...

People may be interested in your services even if they don't return your phone calls...

When talking on the phone with a prospective client you should spend more time trying to "reject" them than convincing them...

The very last thing you should do is develop a proposal – but when you do it should hardly tell anything about what you actually do...

And that's barely the tip of the iceberg! But let's look at what does work – the InfoGuru principle that can be applied to every single area of marketing your services.

What to do that works

InfoGuru Marketing isn't focused on getting but on GIVING. And it's not focused on you, it's focused on the needs of your clients.

InfoGuru Marketing works so brilliantly and so effortlessly because you're providing useful, valuable information and resources to your prospective clients. You spend virtually no time talking about what you DO or what you KNOW. Instead you learn about what they need and determine where they want to go. And now, instead of pushing people away, they are attracted in droves because you have something they want – the promise of a solution that works.

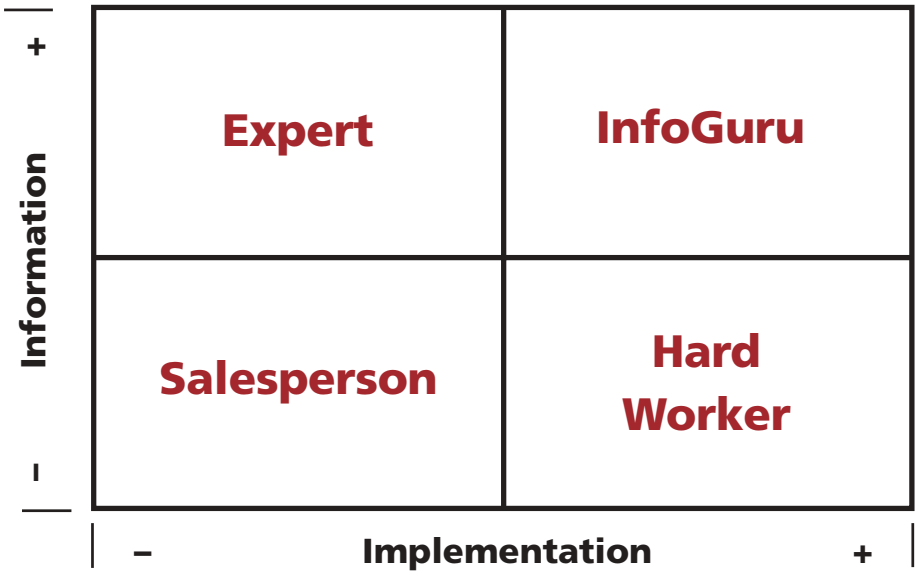
An InfoGuru Marketer might attend networking events, but the focus and purpose are now completely different. You don't talk about yourself, you ask questions and listen. You don't give out your card urging people to call, you ask for their card and tell them you'll send them a recent article you've written or a case study of a successful project. You do contact past clients, but it's never to ask for work, it's to share an idea or a resource. But your call is never a voice from the past,

because they've been getting your newsletter or eZine every month for the past year. They're happy to hear from you. And when you mail letters to many prospects at once, it's not to ask for business but to invite them to an event or tell them about a valuable report you'd be happy to send.

The InfoGuru Four Quadrant Grid

As an Independent Professional you have two main things you have to offer: What you know – information, and your ability to implement. The problem is, we often focus on one or the other, not both. When we combine them both, we're truly InfoGurus.

The following diagram illustrates the balance between information and implementation:



In the lower left quadrant we find the Salesperson. The Salesperson sells a **"Commodity,"** something anyone could sell. Yes, if you say you're selling "training" or "resume preparation," you are marketing yourself like a Salesperson. There's nothing to differentiate you from everyone else. The Salesperson is always focused on what they HAVE to offer to their clients. It's not about a solution.

The lower right quadrant is the Hard Worker. This quadrant makes up the vast majority of independent professionals. They put in time and effort and make a contribution, often doing excellent work. But what they focus on selling is a **"Process"** or what they DO for a client. If you're marketing and selling "the XYZ facilitation methodology" or the "career management process" you're marketing yourself as a Hard Worker. You pay attention to the time and effort you put into the processes you offer.

The upper left quadrant is occupied by the Expert. These are the academic types, people who know a tremendous amount and who put a premium on what they know. Much of their knowledge is theoretical, not practical. Experts sell **"Expertise."** If you are

selling "the Quantum Training Concept" or the "Lateral Career Progression Index" you are marketing yourself as an expert. Experts can write brilliant marketing plans but are often hopeless at attracting clients to their own businesses.

The upper right quadrant is the InfoGuru. InfoGurus not only have an abundance of information and knowledge, they are masters at applying this knowledge in practical ways to help their clients. InfoGurus sell **"Solutions."** And what you'll discover is that what clients want more than commodities, processes and expertise' are solutions that make a bottom-line difference.

How do the different categories market themselves?

Salespeople: Their ideal marketing medium is **calling and mailings**. They have something to sell and they want to tell as many people about it as possible. I get calls from independent professionals and service firms every day marketing services like this. They never find out about me or ask what solutions I'm looking for. They have turned their service into a commodity with very little differentiation.

Hard Workers: Their main approach to marketing is **making new contacts.** This approach is OK if you are selling a service that everyone is familiar with but it doesn't differentiate your services above everyone else's. You're often seen as just another service provider, hustling for business.

Experts: A great majority of experts rely on **writing articles and speaking**. Nothing wrong with that, in fact those are excellent strategies. The problem is that the articles and talks are often more conceptual than practical. It's sometimes hard to see what this information has to do with how they can help your business.

InfoGurus: The approach InfoGurus use to market themselves is **EVANGELISM! InfoGurus work at spreading the word about how to make things work better.** They are committed to results, passionate about solutions, fanatical about what really works. And they spread their gospel far and wide using any and every marketing tool they can get their hands on. InfoGurus get business from all corners because so many people hear about them and their innovative, problem-solving approaches.

So how are you going to market yourself? As a Salesperson, a Hard Worker, an Expert or as an InfoGuru? Hint: It's more fun and more rewarding to market as an InfoGuru, as we shall see.

Underlying principles

InfoGuru Marketing works because it is based on simple underlying principles that will always be true about human nature. It doesn't matter what technology or medium you use to market your services if you keep these principles in mind:

People react favorably to InfoGuru Marketing because of these principles:

Selfishness – People are looking out for "what's in it for me." When you give them some useful ideas and share results that apply to them, they respond with increased interest.

Familiarity – People like to do business with people they know and trust. Let them know about what you do and how you think and they will feel comfortable with you and more likely to work with you.

Resonance – People also want to do business with people they like. People like other people who are generous and helpful and who produce results.

Reciprocity – People are likely to do business with people who have given them something valuable because they feel they "owe it to them."

Some wisdom from Claude Hopkins

Claude Hopkins was a copywriter, some say the "father of modern advertising." In 1920 he wrote a book called *Scientific Advertising.* It's still in print by the way, along with his biography, *My Life in Advertising.* I learned about this book through the marketing consultant Jay Abraham. He made the bold claim that the ideas in this book made him more than 2 million dollars in the course of his career. In writing this manual, I revisited *Scientific Advertising* to learn what he had to say about InfoGuru Marketing. It's right there at the beginning of Chapter Three – "Offer Service." (The words in brackets are mine)

Remember that the people you address are selfish, as we all are. (Think "What's in it for me?") They care nothing about your interest or your profit (or what you do). They seek service for themselves. (Solutions and benefits.) Ignoring this fact is a common mistake and a costly mistake in advertising. Ads say in effect, "Buy my brand (or my service). Give me the trade you give to others. Let me have the money."

This is not a popular appeal.

The best ads are based entirely on service. They offer wanted information. They cite advantages to users. Perhaps they offer a sample, or to buy the first package, or to send something on approval, so the customers may prove claims without any risk.

Claude Hopkins understood the essence of Marketing based on giving way back in the 1920's. And he applied this principle to grow companies like Pepsodent, Goodyear Tires and Bissell carpet cleaners. You can use exactly the same principle to attract new clients to your professional service business. By the way, you can get a complete and free copy of Scientific Advertising online in the Goodies Section of this manual.

Not Attracting Enough Clients? Here's Why.

You're not attracting enough clients to your business for a very simple reason. You're not doing the right things.

Not only are you not doing the right things, you actually think you know the right things you ought to be doing. You most likely think you should be doing more networking, have a better web site, and do more speaking engagements. You think you need to "get out there more."

But those are not the right things. After all, you've tried all of those things to some degree, haven't you? If they really worked, how come you're not doing them consistently? If they worked they would bring you all the new business you needed. Right?

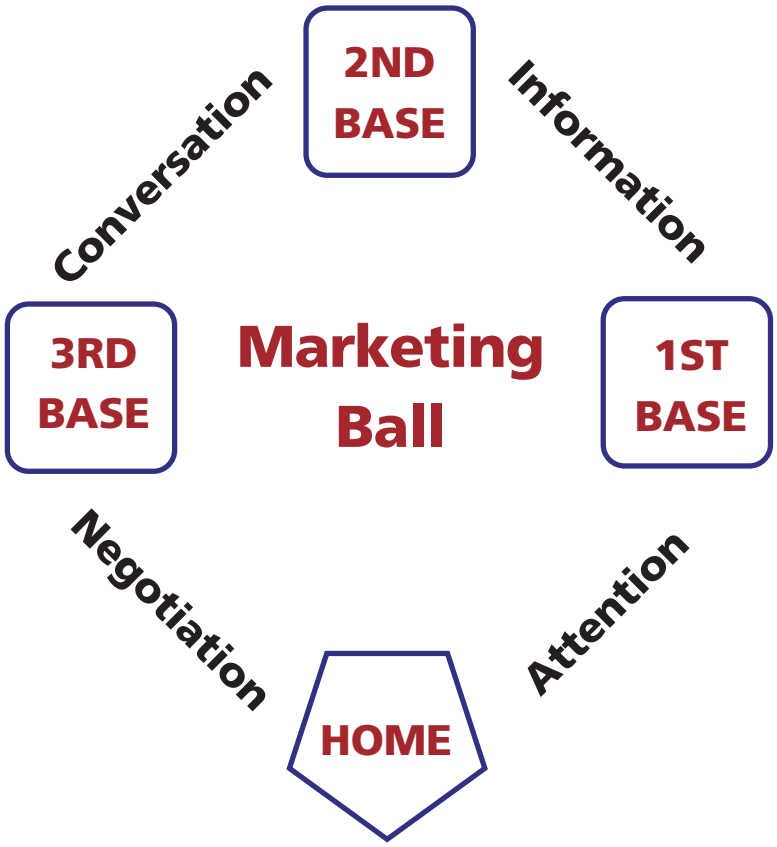
No, doing the right things first means understanding how the marketing and sales process actually works and then following a proven system for attracting new clients. Perhaps one of the best ways to look at this is through the game of baseball.

To win at baseball you need to do four main things. You need to throw the ball, hit the ball, catch the ball and run. Pretty simple, right? But consider this: I can take a bunch of people and put them on a baseball field and have them throw and hit and catch and run and you don't necessarily have a baseball game going on. You just have a lot of activity that leads nowhere. You get some exercise but that's about it.

And that's how most Independent Professionals approach marketing! They get on the field of business and do some networking and calling and mailing, but not a whole lot happens. They certainly aren't playing the marketing game. Because if they were, they would be attracting more clients than they could handle. In baseball you'd never settle for those kind of results. Why would you settle for it in something that's responsible for your livelihood?

Putting it all together with "Marketing Ball"

An excellent way to better understand the whole InfoGuru Process is through the analogy of baseball. You'll find this model very useful in understanding how to win at InfoGuru Marketing.



For a more detailed diagram, see the Appendix.

I developed this model when working with a client and we were trying to identify where he was in the marketing process. This model slowly emerged and has become the main model I use when explaining how the marketing process actually works. Here are the main rules of marketing ball.

1. The aim of the game of Marketing Ball is to attract as many clients as you can handle in your business while making a profit.
2. To successfully attract new clients you must cover all the bases. If you miss a base you are tagged out and lose that client.
3. You must get solidly on each base before you can proceed to the next base.
4. Your prospects determine whether or not you are solidly on a base and whether or not you can move to the next base.
5. Each client you are trying to attract equals playing one game. You can play as many games as you can manage simultaneously.

The object is to start from Home Base where you don't have a client, go all around the bases and then get back to home again where you have secured a new client. The number one rule in baseball and also in "Marketing Ball" is that you have to touch each and every base before you get to home plate. If you miss a base, you're out of the game. Here are the steps:

Home Plate Objective – You have identified potential prospects that you want to offer services to and have found ways to connect with them.

First you need to get up to home plate to start playing the game. To do this you need to find a field or fields to play on and put yourself in front of prospective clients. There are several ways of doing this, from networking, to asking for referrals to doing speaking engagements to direct mailings.

Getting to home plate means you're ready to play the game. The trick, of course, is knowing the most effective ways of getting in front of prospects. For each business it's a little different. For many Independent Professionals they think this is all there is to marketing, but it's really only the starting point.

First Base Objective – The prospect knows you exist. You have their attention and interest and they want to know more.

To get from Home Plate to First Base you need to get the attention of your prospective client. You do this through effectively communicating what I call your "Core Marketing Message." This generates interest so they want to know more. It comes down to what you say when people ask you what you do or what headline is on the letter or brochure you send and what title you use for the talk you give. Words matter here.

The key to generating interest is focusing on results, not process, benefits, not features, stories, not concepts. Tell people what they'll get, not what you'll do.

One of the things you're doing wrong is talking about YOU. You need to start talking more about THEM.

Second Base Objective – The prospect sees you as a possible source of help and has identified both a need and a want that you just might be able to fulfill. At this point they are ready to discuss their needs.

To get from First Base to Second Base you need to give them more information, in the form of an article or report or other valuable ideas that educate them about your thinking, capabilities and results. You want to build a case for your solution. Many miss this step altogether. The purpose of this information is to warm up your prospect so that they will be willing to meet with you and discuss their needs.

Realize that it sometimes takes a LOT of information to move a prospect from first base to second base. That's why marketing isn't about one-shot deals, but about building long-term visibility and value. Keep-in-touch marketing strategies such as newsletters, eZines and invitations to presentations will keep the information flowing. Sooner or later you'll get to second base.

Third Base Objective – You have agreed in principle that working together is the right thing to do. The conceptual sale has been made. Now you're ready to finalize the deal.

Getting from Second Base to Third Base is the whole "selling conversation." This is where you talk to the prospect and determine needs. You explain more about what you do. You present ideas and solutions. You work at coming to a conceptual agreement about how you can help your prospect.

Ideally, marketers are never trying to convince prospects to do business with them. Instead they are in effect saying to the prospect, "You already understand the value of my services, now let's discuss if these services are right for you or not." Smart marketers are able to do this because they've built up trust through the information they've provided. Nobody wants to discuss business with a complete stranger who has a "great" idea. This is why so many get tagged out early in the game.

Home Plate Objective [$core] – You have a win-win contract or agreement and are ready to move to implementation.

Getting from Third Base to Home Plate involves negotiation and wrapping up the deal. You're not complete until you've put together a proposal and gotten agreement from your prospect that you will proceed with the work.

The key here is to structure a win-win agreement that will ensure that the expectations of the client are met while getting them to take responsibility for the success of the project. How to do this will be covered in chapter eleven.

And of course, the more times you get around to home plate successfully, the more success you have in your business.

Dugout Objective – You have performed in such a way for the client that they refer a continuous stream of new clients to you.

After you round the bases to home you go back to the dugout. In our analogy, the dugout is where you take care of your client. Performing for the client means all the big things like doing a great job and adhering to the highest standards of excellence and integrity. It also means paying attention to the little things like returning calls, staying in communication and handling problems immediately.

The work you do in the dugout is often the most important marketing step of all. If you don't meet or exceed client expectations your business will never gain the momentum that comes from word-of-mouth referrals.

This model can be used whether you're marketing your consulting or speaking services to a multinational corporation or marketing your coaching services to a one-person business owner. The point is to know which base you're on and to do the activities appropriate to that stage in the marketing and sales process.

Where you can go wrong

A lot of people tend to skip bases. For instance, you want to go directly from home to second base. You leave out the information base. This is what a lot of cold callers try to do, or those who meet someone in a networking session. They want to get right to the appointment and to the selling conversation.

Usually a big mistake. You may have their attention, but you don't yet have their trust. By providing more information, you warm up the prospect. You prove that you're credible and successful. If you try to hurry and get to second base too quickly, you'll get put out of the game before you know what's hit you.

Once at first base people then try to get to third base too soon. This is skipping the sales process altogether and jumping to the proposal or the close. It's happened to all of us. Before we have time to really warm up to what is being offered, the close comes on strong and we get turned off. Again, you need to be patient, listen to your prospect's needs, give them more information and move naturally to the proposal or close.

Finally, many try to get to home base from second base. This means they skip the proposal or close. The purpose of this stage is to confirm understanding, work out the fine details and handle any final objections. And you need to go at a pace that works for the prospect. Sometimes the marketing and sales cycle is longer than we like, but if you try to push it too fast, you'll be tagged out once again.

Of course, once you get to home base, you've arrived at a solid agreement to work with your client. Now the work begins of performing well for that client.

You need to be patient to make this process work. Don't skip ahead or you'll end up out of the running when you're playing on the real field of marketing and selling your services.

In the chapters that follow, we'll outline in great detail every main stage and every single step of the marketing and sales process.

InfoGurus Use Every Tool Possible

Looking at the 5 P's of marketing (more about that later), your Solution is the first P of Positioning. It's what sets you apart. And then InfoGurus use every tool possible under the other 4 Ps.

Packaging	Promotion	Persuasion	Performance
Brochures	Speaking	Listening	Keep Promises
Reports	Writing	Diagnosis	Guarantees
Questionnaires	Networking	Openness	Keeping in Touch
Articles	Referrals	Curiosity	Thank-yous
Web Sites	Newsletters	Visioning	Going Extra Mile
Power Point	eZines	Education	Commitment
Cassette Tapes	Letters	Presentations	Walk the Talk
CD Presentations	Postcards	Asking	Innovation
Videos	Calling	Recommending	Creativity
Books	Media	Assuring	Persistence

All InfoGurus share the following qualities.

- Commitment to what truly works
- Clear communication – they build a solid case
- Generously share what they know
- Help prospects determine future objectives
- Commitment to producing results

In short, an InfoGuru marketer is someone who values what they have to offer, believes in the solutions they provide and is committed to helping their clients achieve results. InfoGurus use that mindset to attract all the clients they'll ever need.

Does this really work?

Being an InfoGuru Marketer isn't about episodic marketing that happens between projects, it's about consistently sharing valuable ideas as long as you're in business. And since your focus is not on getting something but on giving, it starts to become a fun, even joyful activity because you know you're making a contribution. And a wonderful side benefit is that you'll attract all the business you'll ever need.

The purpose of this manual is to share the strategies, the techniques, the skills and the how-tos of successful InfoGuru Marketing. We'll go into detail on all the Infoguru Marketing tools listed in the chart above and we'll do it all from an InfoGuru Marketing perspective. I'll show you exactly what you need to do to turn the tables on marketing and start giving instead of getting. And when you start to seriously apply this new approach, you'll never look at marketing quite the same way again.

Still, you may ask, does it really work? Indeed it does, and I'm living proof. I get 50 to 90 new names on my emailing list every single day using this approach. I gathered 150 to 170 people together two years in a row for a sales presentation (disguised as a workshop) with only four or five hours of work and no money invested. I got over 6,000 people to download a report from my web site in one month. And the result of giving all that stuff away? I have more business than I can handle. In fact, it seems that the more I give away, the more business I get! And all my clients call me. I haven't cold called in years. Throughout this manual I'll be sharing specific ideas that have worked for me and my clients.

But before you jump into the manual and all those InfoGuru Marketing how-tos, there's something else very important to consider.

It's not just what you do

An InfoGuru also realizes that it's not just what they do that creates success. It's who they are BEING. Yes, doing is important and this manual is mostly about doing – how-tos and action plans. We'll talk about giving talks and writing articles, setting up web sites and sending out eZines. All important stuff. But before you do anything, you need to have a motivation, a vision, a passion, or nothing's going to happen.

I come across this every single day as a marketing coach and mentor. People know what to do but they aren't doing it. They are stuck in a default "Marketing Mindset" that consists of fears, misconceptions, cultural myths and stereotypes. Let's look at some elements of a vision that can get you past that non-resourceful mindset.

Several years ago when I started Action Plan Marketing I had the vision of being "The resource that people would call in the San Francisco Bay Area if they needed help marketing their professional service business." And that vision is constantly being validated. I'm now expanding this vision internationally.

But what is connected to that vision? Values that are important to me. Some of them include:

- Commitment to lifelong learning
- Insatiable curiosity about how things work
- Wanting to make a contribution
- Wanting to make an impact, make a difference
- Being independent
- Being innovative and creative
- Intellectual stimulation
- Being recognized and acknowledged
- Being challenged and solving problems

That's the kind of stuff that motivates me. And with that list it was a natural for me to become an InfoGuru. With those kind of values and vision it was only natural that I'd learn what I needed to be successful and help make my clients successful as well.

Action Plan – Vision and Values

Throughout this Manual you'll see this heading, "Action Plan," followed by action steps to put the information into action. Here's your first chance to take a positive step towards being an InfoGuru. And, by the way, this is really the only Action Plan in this whole manual that can produce "Magic."

Here's what one person got from the exercise below:

> "I read chapter one (of the InfoGuru Marketing Manual) the other day. Got to the part where you are to start your "action plan" with your visions and values... and bogged down completely. For several days I read and re-read but just couldn't pick up my notebook to start.
>
> "Finally, I just started. I read the examples you gave... and just started listing my strengths... those things that are important to me... and amazingly enough it started to flow!
>
> "So, after finishing I looked at my list...and here are the items listed... learning, innovation, compassion, teacher, visionary, motivator... and lo and behold I realized that what I've felt about myself all along is really true! I AM a teacher/trainer/motivator. I'm NOT a salesman, I'm not a hard worker, I'm not an expert....I'm an InfoGuru!
>
> "And now I understand what the whole thing is all about! Not what they can do for me, but how can I help them to be the best they can possibly be! And when you concentrate on sharing what you have, instead of selling it to them, it makes all the difference in the world.
>
> "The funny thing is, I've KNOWN that all along, just never really saw how it applied and could help me in my future endeavors. Do what I say, not what I do. NOW, it will be do what I do! Lead by example... because I AM the person I've always wanted to be! Yee Ha.
>
> "Whew..you're right...it DOES change your whole way of thinking!"
>
> Lorian Rivers

Being clear on your vision and values can transform you and propel you in a way that defies explanation. One minute you're sitting there like a dummy, the next you're energized and thinking up a zillion ways to apply this information. **So the magic ingredient in this manual is YOU.** The information won't do anything just sitting in this web site. You've gotta turn it into gold.

1. **Here's what to do before taking another step.** Get yourself a notebook and label it something like "InfoGuru Marketing." As you go through the manual, stop when you get to an Action Plan and start writing. Start creating your own Action Plans to make these ideas real in your business.
2. **The first Action Plan is to write down the vision and values for your business.** Really take some time to think about this seriously. When I wrote down my vision, I tacked it up on my wall. I talked about it a lot; I dreamed about it; I tried to figure out how to make it real.

> Once when I was down in the dumps, for who knows what reason, I got some direction from a coach who suggested I write down what I was committed to – my vision and values. He suggested I not just write down a word or two, but a complete statement for each value. I went back to my office and did it; I can honestly say I haven't been the same since!

Sure I have my ups and downs but, fundamentally, I'm still guided by the clarity of expressing those values and vision. And that's what keeps me going and on-track. Setbacks are minor in the face of a larger vision.

Let me give an example or two to make it crystal clear what I want you to do.

> "I am committed to lifelong learning; I will continually search out knowledge that will make a difference to me, my clients and to the planet."
>
> "I am innovative and creative; I will use my God-given talents to create useful services and products that will make a difference to all who use them."
>
> "I love being challenged; I will continually seek out opportunities that require me to perform at the peak of my abilities. I will overcome difficulties and master skills that will serve me for a lifetime."

Get the idea? Great! Now it's your turn! Write down your vision and values for your InfoGuru business.

Chapter 2

The 5 Ps of InfoGuru Marketing

Mastering Core Marketing Principles

Before we get into all those how-tos of marketing yourself, I want to look at the core marketing principles that an InfoGuru uses to master marketing. And that's the 5 Ps of InfoGuru Marketing. Those principles are what this online manual is based on. People often think of marketing as promotion; others think of it as selling. Still others consider it to be one's business identity. All of these are essential. The 5 Ps simply make sense out of all of these elements and put them into a logical order.

Positioning comes first

This is knowing exactly what you're marketing and selling and who you're selling it to. Sounds simple, but InfoGurus have a real problem with this one. They have great abilities and a contribution to make, but they often can't successfully articulate why anyone should be interested in what they have to offer. And if you can't do that, all the promotion and selling skills in the world won't help you much.

> Positioning revolves around a "Core Marketing Message" that clearly states who you work with, what problems you solve, what solutions you provide, what benefits you offer, what results you produce, what guarantee you give and what is unique and special about your particular service. **Positioning is the foundation that you build the rest of marketing upon.**

Packaging is second

This is taking your positioning strategy and putting it into words, both verbally and in the written form. As soon as you open your mouth to tell someone what you do, you are packaging yourself. Your business card, brochure and web site are physical, tangible ways you package yourself, mostly through the written word. And until you have that packaging together, you're going to have a hard time communicating to anyone about why they should hire you.

> Packaging is the tangible side of Positioning. It's taking a concept or your Core Marketing Message and making it real. **Packaging your services is about crystal-clear communication.** It needs to transmit directly why your services are of value, as well as generate attention, interest, desire and action from your prospective clients.

Promotion is third

The purpose of promotion is to get the phone ringing with highly qualified prospective clients on the line. Once you know what you're selling and it's in a form that people can understand, you can start getting the word out. But what works to promote InfoGuru services? There are dozens, if not hundreds of ways you can promote yourself, but InfoGurus mainly use the information and knowledge they possess, the same information and knowledge they sell to their clients, to market themselves. They leverage this information and knowledge to create visibility and credibility through talks, presentations, articles, reports, web sites and email.

Promotion is all about visibility and credibility. **People like to do business with companies and people who are familiar to them.** No matter what promotional methods you use, you need to ask if you have enough ongoing visibility to build that feeling of familiarity and trust. If you're invisible, nobody is thinking of you, let alone calling you.

Persuasion is fourth

The job of persuasion is to turn prospects who have responded to your marketing into paying clients. And here's where sales or persuasion strategies and skills are essential. If you can master the art of converting a large percentage of those who call into paying clients, you'll have a very successful business.

Persuasion is not so much about convincing people how great your services are; that's more the job of packaging and promotion. Persuasion starts when people call you in response to your marketing. **Persuasion is mastering the art of listening and focusing on the needs and objectives of your clients.** Then it's finding creative ways to meet those needs and objectives in a way that's agreeable to both parties.

Performance comes last

But it is definitely not least. After all, if you don't perform, meet client expectations, go the extra mile and ultimately create "Raving Fans," you're not going to have much luck in growing your business. It's word-of-mouth marketing that finally determines most InfoGurus' success or failure. So your job is to deliver the goods – in spades – and keep those referrals coming in.

Performance is much more than getting the job done at a high level. It's about paying attention to every single thing that impacts the customer relationship. **Performance is about perception – the perception of the client and their expectations.** When you understand those perceptions and expectations and can deliver what they truly want, you've mastered performance.

Now there are a lot of other Ps in marketing! There seem to be dozens of them: Product, Place, Price, Proposal, Presentation... and we'll cover many of those as well, but we always want to come back to the basics. Everything in marketing your InfoGuru business can be contained in the 5 Ps. In this manual there are two chapters on positioning, three on packaging, nine on promotion, five on persuasion, and two on performance. And, of course, there are many of the Ps that overlap.

Consider this scenario: You are at a networking event and someone asks what you do. All five Ps kick in! To explain what you do you first need to have positioned and packaged your services so people will both understand and get interested. You showed up at the networking event, so that's promotion. You're talking to someone face-to-face, so that's the start of the persuasion process, and in the course of your conversation you mention things you've done for other clients – performance.

The whole conversation might only take five or ten minutes, but how well you have developed your 5 Ps of marketing will make the difference between an unsuccessful "marketing event" and a successful one. In one case you might walk away with nothing at all, in the other you may get their card, have developed real interest in what you can do for them, and made an agreement that you'll call tomorrow to set up an appointment with their executive committee.

This manual is how to build such a 5 P strategy and gives you the hands-on how-tos to accomplish successful "marketing events" over and over and over.

You'll learn how to:

- speak about what you do so that people listen and respond
- prepare materials that people read and that actually motivate them to call you
- get known as an expert who can solve difficult business problems
- turn conversations with prospective clients into proposals and contracts
- build word-of-mouth business that keeps your business growing consistently

It's time to jump in and become an InfoGuru who's mastered how to promote your services!

Building a 5 P Marketing Plan

A 5 P marketing plan is a matter of developing a complete strategy for all of the 5 Ps. One way to do this is to ask marketing questions for each of the Ps and then go to work in answering those questions. I've listed the key questions and the main things you need to do to market yourself below. The purpose of this online manual is to help you answer those questions and then put those answers to work in your business.

Positioning your business

- What exactly is your **business solution?** That is, how does your service solve a particular problem, alleviate a pain or add value?
- Who exactly are your **targeted potential clients**? Where are they; what industry; what size; what needs; what past experience with your kind of service and what buying process? What are the adjectives you'd use to describe your ideal clients – innovative, conservative, leading-edge?
- What are the **specific benefits** your clients receive? What advantages, improvements or enhancements do your clients get as a result of working with you? What results can they expect?
- What is your **unique competitive advantage**? That is, what differentiates you from your competitors? What do you do better, different, faster, cheaper, with higher quality or with a different spin? Be specific, not vague.

- What is your **business identity**? What are the qualities you want to be known for? Is it integrity and dependability or expertise and exclusiveness? You can't be everything to everybody. Next ask what you are going to do to live up to these qualities.

Packaging your services

- Do you have an attractive and appropriate **Business Identity Package** consisting of a logo or company masthead on a business card, letterhead and envelopes? This is the look for your business and needs to express your identity and positioning strategy.
- Do you communicate the value of what you offer in everything you do? Do your prospective clients understand immediately what's in it for them if they use your services? Do you emphasize benefits and results over features and processes? Can you distill this down to a one- or two-page **Executive Summary**?
- Do you have basic **marketing materials** (brochure or other printed material) for your business? These materials should include, but not necessarily be limited to: An overview of the problem that you have a solution for; an overview of your solution; a description of your Unique Competitive Advantage; a listing of your key customer benefits; a listing of your various services; testimonials from satisfied clients; a listing of clients or client companies; biographies of company principals; information on how to contact your company and how to do business with you; your address, phone, fax and email numbers.
- Do you have a **process of pricing** your services and preparing proposals? Are you value-pricing, that is selling a solution, instead of your time? Are you sure to include objectives, value and measure of success in your proposals? Do you avoid "giving it all away" when you prepare a proposal? Do you know how to hold the line on your fees by subtracting value if they want to lower the price?
- Have you put some attention on your personal package, your **personal presentation**? If you're a professional service business, you are selling YOU. You're the package. People make a dozen or more assumptions about you and your business in the first few seconds after meeting you in person or talking to you on the phone. Are you walking your talk?

Promoting your services

- Are you **building relationships** through authentic marketing activities? Are you doing everything possible to share information that will be valuable to your clients and prospects?
- Do you have strategies in place for **generating referrals**? Are you providing a high level of client service? Are you communicating clearly about your benefits and advantages? Are you asking for referrals, when appropriate? Are you creating alliances with other InfoGurus so you can introduce yourselves to each others' clients?

- Do you stay as **visible as possible** to your clients, prospective clients and associates? Do you belong to any networking organizations, volunteer or community groups? Do you get actively involved in these organizations? Do you have a web site with all the information about your business posted so that people can learn more about what you do and how you can help them?
- Do you do **personal PR** such as speaking and writing? Are you speaking at community groups, chambers of commerce and professional associations? Are you writing for community papers, newsletters, the trade journal for your industry, for web sites? Are you leveraging these speaking engagements and articles by inviting those on your list, getting reprints of articles, turning talks into articles and articles into talks?
- Are you **mailing or emailing** to people on your list? This is an absolute must. Don't let people forget who you are and how you can help them. From six to twelve times a year are you sending clients and prospects a newsletter, an eZine or other type of keep-in-touch mailing?

The persuasion process

- Do you have an **Audio Logo**? When someone asks, "what do you do?" do you have a concise and powerful solution statement that expresses what you do in a nutshell? Is what you say totally focused on what you can do for them? Do you always answer the question, "What's in it for me?"
- Do you spend the majority of your time in a sales situation, on the phone or in person, **finding out about the needs** of your prospect? Do you have a series of well-thought-out questions that help you learn about their situation, their problems and the implications of not taking action?
- Do you ask **future questions** of your prospects? That is, do you ask questions to determine not just what problems they want solved, but what they want things to be like once you've helped them? Do you dig in and determine exactly what objectives they need met in order to be satisfied?
- Can you present what it is you do in a **benefit-oriented presentation**? Once you know the situation, problems and objectives of your clients, can you outline a course of action that will solve those problems and meet those objectives? Can you put all of this into a concise proposal?
- Do you wait for people to take action or do you **move the action forward**? Are you comfortable about recommending a course of action? Can you do this appropriately, without pressure or manipulation, outlining the advantages of moving forward with the project?

Performance in your business

- Are you good at **communicating with clients** in every stage of the project, from the sales process through the proposal and into performing the project? Are you clear about what you will do, when you will do it and what results they can expect? Do you set things up so there are minimal surprises?

- Do you make **promises you can keep**? Are you aware of your abilities and limitations and do you only make promises that you can succeed in fulfilling? Do you manage expectations so that you are always able to perform at a level above the promises you make? Your clients will judge you, not on what you promise but on what you actually do.
- Do you **make requests of your clients** so that they know what you expect of them? Are you sure to define the accountability of each party so that misunderstandings don't occur? When agreements are broken by your client, are you able to talk about it and get things back on track right away?
- Do you **go the extra mile** to create "Raving Fans"? Are you continually working to improve your skills in all areas of your business? Are you building a network of resources that can help your clients in areas where you don't have the expertise? Are you seen as the ultimate resource to your clients?
- Are you **clear about your purpose** and vision for your business? Do you have a statement of your vision and written goals that you are continually moving towards? Do you do the things necessary to not only make your clients successful but to make your business successful, rewarding, and fulfilling?

Marketing ScoreCard

Take a few minutes to score your current marketing effectiveness on the Marketing ScoreCard. **Score yourself from 0 to 5 on each of the questions. Subtotal each section and then total the whole ScoreCard.**

Area of Marketing	Score
Positioning	
Target/Problem. I know who my clients are, where they are and what problems, issues and challenges they are facing.	
Ultimate Outcome. I have a clearly articulated outcome statement for my business that tells what my clients get when they use my services.	
Value. I have outlined a number of specific client-centered benefits that my clients receive when they use my services and that answer the question, "What's in it for me?"	
Uniqueness. I have a Unique Competitive Advantage that explains why I am different than my competition and what that means to my clients.	
Proof. I have a number of client success stories, both written and verbal, that I can employ to prove that I am able to deliver the outcomes and value that I promise.	
Total	

Area of Marketing	Score
Packaging	
Web Site. I have a professionally designed, content-rich web site that provides detailed information on my services and includes plenty of valuable free information.	
Clients Issues. I have information on my web site that clearly outlines the problems, issues and challenges my clients are dealing with. I show that I understand who my clients are and what they want to accomplish.	
Services – What You get. My services, what I do and how I do it, are clearly presented in a brochure, marketing package or web site. It's no mystery what you get.	
Pricing and Proposals. I have a well-defined pricing strategy and proposal outline.	
Business Presentation. Everything about my business, including my personal presentation are presented in a way that truly represents who I am.	
Total	
Promotion	
Relationship. Through all my promotional vehicles people get a sense of who I am and what my services are really about.	
Referral Systems. I have several ways to actively generate referrals from existing clients. Referrals are one of my strongest sources of new clients.	
Visibility Systems. I stay visible to my target market and expand my credibility through networking and a web site.	
Expertise. I communicate my expertise to my target market through speaking to groups and writing/publishing articles.	
Keep-In-Touch Systems. I send information to clients and prospects on a regular basis through a newsletter, eZine or other mailings.	
Total	
Persuasion	
Focus. Whenever I speak to someone about my services and their needs, I am totally focused on what I can do for them – how I can help.	
Needs. I am skilled at building rapport by learning the past and present situation of my prospects through a series of well-thought-out questions.	

Area of Marketing	Score
Persuasion *(continued)* **Objectives.** I am skilled at motivating my clients to use my services by discovering what future objectives are the most important to them. **Presentation.** I have a well-structured and well-organized presentation designed to inform my prospects about exactly how I can solve their problems and meet their objectives. **Recommendation.** I am successful in asking for the business. I know what to say and do to win a prospect's commitment to my services.	
Total	
Performance **Communication.** I understand that the key to successful client engagements is clear communication. I work constantly at improving this skill. **Promises.** I make clear, unambiguous promises for what I will deliver and what results clients can expect when I undertake an assignment or project. I keep my word. **Requests.** I make crystal-clear requests of my clients so they know what I expect of them in a client engagement. They understand that we are partners. **Extra Mile.** I don't just offer good service. I do everything in my power to deliver service that consistently exceeds clients' expectations. **Personal Performance.** I stay motivated and true to my personal vision of my business. I get the things done, not only for my clients, but for myself to make my business successful.	
Total	
Grand Total (out of a total possible 125)	

How well did you do? Don't feel too bad if your score wasn't very high. That's not unusual. And it's why you bought this manual in the first place. Now it's time to go to work to increase those scores!

Action Plan – The 5 Ps

Note the areas above that you need to understand better and where you need to develop new skills in order to implement InfoGuru Marketing successfully. That's exactly what we'll be covering in this marketing manual. I know it's a lot to cover, but relax! Just take it one chapter at a time.

Chapter 3

Positioning *– Developing Your Core Marketing Message*

How Does Marketing Work?

I want you to imagine two celestial bodies. We'll call the first one "The Client Planet" and the second "The Service Satellite." The Client Planet has a satellite dish and the Service Satellite is beaming its message to the Client Planet.

The Client Planet is receiving on the frequency WIIFM – "What's In It For Me." The Service Satellite is broadcasting on the frequency WWD – "What We Do." Now the problem is that the broadcaster – YOU – are usually not getting through to the receiver. You're doing your best to get your message across, but it's not coming through loud and clear. So the client is not responding. They might hear you, but it doesn't make much sense to them.

Why is this? It's because you're not broadcasting on the WIIFM frequency. Your potential clients simply don't understand what's in it for them.

What you need is a signal decoder. And that decoder is called your **Core Marketing Message.** Putting your CMM to work will turn your messages into something your potential clients can understand and want to respond to. Your CMM transmits directly and powerfully what your clients get when they use your services.

Your Core Marketing Message has to be focused, crystal-clear, and speak to the needs of your prospective clients. When they see or hear your CMM, your goal is to get a "that's for me" response. It should make them want to find out more, drive them to your web site, get them involved in your solution and, ultimately, pick up the phone to do business with you.

Your Core Marketing Message actually has several different but very important aspects. Let's look at them:

Target Market – Who is your message directed to?

Problem/Solution – What is the concern or issue of your client, and what is your solution?

Benefits – What are all the various ways your services help your client?

Unique Competitive Advantage (UCA) – What makes you stand out in a way that makes a difference to your clients?

Risk Reversal – What are you promising to deliver that reduces the perceived risk of your clients doing business with you?

All of these aspects of your Core Marketing Message are essential. We'll look at them in some detail and see how to fine tune your "marketing signals."

Target market

You can look at this from several angles. They are all very practical: Who buys your service? What are they buying (what solution)? When do they buy? Why do they buy?

Let's look at the who in more detail. You can divide your prospects into two broad categories – Demographic and Psychographic.

Demographics are the basic facts about a company. Size of company, industry, geographic location, number of employees, years in business, etc. If you're selling to individuals, it's things like age, gender, education, income, etc.

Psychographics is more about the character, style or personality of the business or individual. It's the adjectives you'd use to describe them: Creative, conservative, frugal, athletic, etc.

What are they buying? What solution is most important to them? What problem, if you solve it, will make a difference to this client? What keeps them up at night?

When do they buy? Are there natural times of the year or business cycles? What influences the buying decision?

Why do they buy? What moves them off the dime? Clients usually don't take action until the cost of not acting is greater than the payoff of not acting.

In the next chapter we'll get into Targeting in even more detail as it's such an important factor in marketing InfoGuru services.

Problem/Solution

This is at the heart of your Core Marketing Message. If you don't communicate this well, your client will not get it; they will not respond; they will not buy. The principle is very simple: if you can clearly articulate a problem your client has, and you can demonstrate credibly that you can provide a solution to that problem, they will listen to you. Period.

If you are unclear about the problem and unclear about the solution, you are in very deep trouble. Your message will not get across.

So first, let's look at what you are probably doing wrong.

The Label. When asked "what do you do?" we most often respond with our label. Our label might be our profession: I'm an accountant. I'm an OD specialist. I'm a consultant, etc. The problem with labels is that nobody really knows what they mean. Sure, they know an accountant does stuff with numbers, but what does that mean to me? What's in it for me? Nothing, as far as I'm concerned.

When you tell people your label it's a good way to stop the conversation cold. "I'm a Lawyer." Conversation over. And if people keep talking, it's only being polite. They wrote you off already and are just trying to be nice. So don't just tell people your label.

The Process. Now, when people do this they think they're communicating. The trouble is they are still not addressing "What's in it for me?" They are explaining the process of what they do. Boy, if you want people to glaze over, this is the perfect strategy. Just let people know that you "optimize the human resource function through cross-functional teams by the use of a special communication dynamic developed by professor Humpplebaum." They'll be thrilled. And confused. It's OK to talk about process later – much later when you have their attention and interest.

OK, so those two don't work. What does work?

Problems. It's very simple, folks. I call it the ***burning, itching, swelling, syndrome.*** "Got burning, itching, swelling? Then you need...." This approach works so well because people are living in, thinking from and immersed in their problems. So if you articulate a problem clearly and succinctly and demonstrate that you do indeed understand that poor suffering human being, you'll get their attention in a nanosecond.

And the more specific you can be about the problem the better. If you talk about poor communication in companies you may get yawns, but if you talk about the communication between GenXers and Baby Boomers and how this cross-generational miscommunication is leading to turnover that's costing the company money, you'll start getting someone's attention.

Solution. This is simply the flip-side of the problem. If you can now demonstrate through logic, examples, testimonials, and guarantees that you do indeed have a solid solution to this problem, you will get the ear of those clients. You'll have finally tuned into their WIIFM.

So how do you apply those principles to your business? Easy.

Your Solution Statement or Audio Logo. One of the most important "possessions" a business owner can have is a crystal-clear Solution Statement or Audio Logo that directly transmits from your satellite to their satellite dish.

"I help Gen Xers communicate with Baby Boomers in business and save hundreds of thousands of dollars in attrition costs."

"You know how a lot of small businesses struggle to find new clients? I have a service that guarantees them new clients."

"I slay dragons – the dragons of fear when you get up to speak. Our presentations skills course is guaranteed to make you a more confident presenter or your money back."

"You know what a hassle it is to get your oil changed? Well, we come to your company and change your oil while you're at work."

Get the idea? Problem... Solution.

For even more detailed ideas on developing an Audio Logo, check out Chapter 5, Packaging Your Services – Verbally.

Benefits

Benefits are the next aspect of your Core Marketing Message. And all benefits are additional solutions, additional advantages to the client. Benefits are not what you do. Benefits are what the client gets. The problem a lot of people have is that once they've answered what they do using a solution statement, they then proceed to tell how they do what they do. Don't go there! Tell them more about what's in it for them. You've made a connection with your message; now lock in the interest with more benefits.

For instance, the follow-up to my solution statement would be:

> "How do we help people get new clients guaranteed? Good question. First, we get them more attention and visibility in the marketplace so more people know what they do. Next we get a better response to all the marketing activities they do. Next we help them convert a higher percentage of interested clients into paying clients, and finally, we help them make larger sales. So the net result of all of this is more clients and a higher income – with less stress and struggle."

Notice there is very little process here. It's all benefits and advantages.

If you tell people too soon what your process is, you'll often actually help people find reasons NOT to use you. "Oh, I did that before and it didn't work." or "That sounds like what we're already doing."

The thing is, you know what you're doing is unique, special, valuable and worthy of their time. But they don't give you the time of day because they think they understand what you're about. You fell into the feature/process trap. Don't do that. To make this even more clear, look at the following chart:

Benefits – Advantages	Features – Process
Increase profits and cash flow	Cash flow analysis program
Improve communication	Use NLP modeling techniques
Reduce employee attrition	Do employee survey
Improve customer satisfaction	Implement customer feedback system
Increase pull from advertising	Design new ad campaign
Leverage diverse workforce	Implement diversity standards

All the benefits on the left are what the client gets. All the features and processes on the right are stuff you do to get the benefits on the left. Now there's nothing wrong about talking about features and processes, but they are not part of your Core Marketing Message. They come later when the client has already shown interest in what they get – the benefits.

You don't get into features and processes until they've bought the result. Until they've bought the concept. Until they've seen your commitment to solving their problem. Results, solutions, benefits and advantages are emotional. Processes and features are logical. Once they have bought emotionally then they will use the processes and features as rational armaments to justify the emotional decision they have already made. But never start with processes and features.

Results

Speaking about your actual results can be a key component of your Core Marketing Message. Once people know about the problem you solve and the solutions and benefits you provide, they'll be interested in hearing of actual examples where you've done this. You can provide information about results in short stories when speaking to people and in the form of "case studies" in your marketing materials or web site. For example:

> "A recent client I worked with called me in because they were experiencing serious attrition problems. We analyzed the situation and learned that they were making major mistakes in their hiring process. Once they corrected them their attrition rate dropped dramatically, and they saved half a million dollars last year."

It always amazes me that people who have produced incredible results with their clients fail to share that information with their prospects. They focus on what they do, their processes, their models, and a lot of things that the prospect couldn't care less about. A good portfolio of stories or case studies goes a long way to convince a prospect that you can get the job done.

Unique Competitive Advantage (UCA)

Your UCA is what makes your business stand out in a crowd of look-alikes. It's what helps your clients understand how you're different, and it shows how this difference is an advantage or a benefit to the client. A pretty tall order.

A UCA can be many things. Here are some professional service business examples.

- It can actually be your problem/solution statement in itself.
- It can be your approach to what you do or how you do what you do (a marketing approach, not a psychological approach).
- It can be the kind of client you serve (specialists in the testing equipment industry).
- It can be the way you provide your service (training done over the noon hour).
- It can be your style (balloon twisting that's more than just doggies).
- It can be a visual identity or brand (Mutombo, the Siberian Husky).
- It can be the speed of service (when you positively, absolutely have to have it tomorrow).
- It can be a solid guarantee (10% reduction in price for every day late).
- It can be a payment policy (you don't pay until you're 100% satisfied that the job is done right.)

Any of these can be your UCA. But it has to be a UCA that is right for you, right for your business, right for your clients. A great UCA accomplishes the following:

- It speaks to WIIFM first and foremost
- It makes it clear who the service is for
- It communicates something others are not communicating
- It conveys a difference that is interesting
- It guarantees a level of performance

Now some UCA's are better than others because some services are, by their very nature, more interesting, solve a problem in a more novel way or are just plain different and thereby intriguing.

The mistake people make is not looking at their business from the point of view of the client. If you try to think from their point of view, what can you see about your business that is fascinating, helpful, unique or sexy? You're looking for a WOW factor that sets you apart.

Here are a few good Unique Competitive Advantages

- We specialize in only working with professional service businesses. Not only that, we're a professional service business ourselves. We market our business exactly the same way you need to market your business.
- Other outplacement firms use a psychological model that assumes there's something wrong with you if you got fired. We use a marketing model that helps you get back into the job market as quickly as possible.
- Because time is short, we provide quality training programs that are delivered over the noon hour. Your employees still have most of the morning and afternoon to do their work.
- We guarantee that the software we develop will always be done on time and within budget. Not only that, we guarantee to fix any bugs in the software for as long as you use it.
- Since the biggest complaint that printers get are jobs that aren't delivered on time, we have this guarantee: For every day that a printing job is late, we'll take 10% off the total price.

Are you starting to see how a Unique Competitive Advantage can become the heart of your Core Marketing Message? It's the thing that sets you apart from everyone else and gives your prospects a way to both distinguish your service from others, as well as see a clear advantage to doing business with you.

And yet most InfoGurus don't have a clearly defined Unique Competitive Advantage (sadly they also usually don't have a target market, a problem/solution statement, or a list of benefits either).

Risk reversal

When your client is looking at buying your kind of service they are facing certain risks. It might not work. They might look bad. They might lose and nobody

wants to lose. What you want to do is find a way to reverse the risk to the client. You actually want to put the risk on you so the perception of risk to them is diminished.

This is one of the most powerful aspects of your Core Marketing Message. But it is often not used for several reasons. The main reason is that the service provider feels that, if they guarantee the service, people will take advantage of them. This is understandable but generally unfounded. An interesting thing happens when you make a guarantee – you start to actively look for ways to do your job better, to go the extra mile, to build in systems and processes that ensure you will deliver.

And giving a guarantee doesn't mean that you give away the store. Guarantees can be conditional and based on not only what you do but on what the client does. If they don't get you the information you need or attend the meetings they said they would, etc., your guarantee becomes null and void. A guarantee is a two-way street. When clients are clear about this, it increases the chance of a win-win relationship.

The great thing about this is that you can give a very powerful guarantee that reverses the risk, while at the same time getting solid assurances from the client that they will do their part to ensure the success of the project. It also enables you to charge a premium price for your services. But that's a topic we will go into later.

A risk reversal policy should not be an optional "nice thing to have." It can and should be an important cornerstone of your marketing strategy. Billion dollar companies have been built on risk reversal strategies. This is something you can't afford to be without.

By the way, sometimes your Risk Reversal Strategy is the Unique Competitive Advantage itself and sometimes it's a stand-alone aspect of your business. For instance, the UCA that you are a "specialist in your area who can solve problems that no one else can solve" can be pretty attention-getting. Added to that, you guarantee that you can solve any problem in that area in a week or less. Now you have some power behind your marketing.

Action Plan

Develop the different aspects of your Core Marketing Message one step at a time. Don't worry about how you say it. Focus on the meaning of what you are saying. In the next section below we'll focus on how you say it.

1. **Target Market** – Who is your message directed to? – for more details on this, check out the next chapter on Targeting.
2. **Problem/Solution** – What is the key concern or issue of your client and what is your solution?
3. **Benefits** – What are all the various ways your services help your client?
4. **Unique Competitive Advantage** – What makes you stand out in a way that makes a difference to your clients?
5. **Risk Reversal** – What are you promising to deliver that reduces the perceived risk of your clients doing business with you?

"Marketing Memes" – *How to Be Instantly Understood by Anyone When Speaking About Your Business.*

Now that you have the main elements of your Core Marketing Message, you need to consider how you express that message. Have you worked on messages like this for hours and they still don't have any oomph? I'm going to show you how you can start creating marketing messages that hit home every time. Don't believe me? Read on!

Powerful marketing messages aren't only about the content of your message. Just as important is the way in which you structure your message. That's the key that almost everyone misses.

What do you meme?

In 1976, Oxford University biologist Richard Dawkins wrote a book called "The Selfish Gene" in which he introduced a new concept to the history of culture: memes (it rhymes with "seems"). A meme, Dawkins asserted, is much like its biological cousin, the gene. Like a gene, a meme is self-replicating. However, memes don't replicate biologically; instead, they are passed along in the form of ideas. Dawkins argued that memes are the "basic unit of cultural transmission."

He wrote:

> "Examples of memes are tunes, ideas, catch-phrases, clothes fashions, ways of making pots or of building arches. Just as genes propagate themselves in the gene pool by leaping from body to body via sperm or eggs, so memes propagate themselves in the meme pool by leaping from brain to brain via a process which, in the broad sense, can be called imitation."

Jump ahead twenty years and to another book called "Rapid Response Advertising" by Geoff Ayling, an Australian advertising man. Ayling builds a strong case for the use of memes in marketing and advertising, and he thinks that the meme is the missing piece of the marketing and advertising puzzle. "A meme," he writes "operates through the process of chunking complex concepts or ideas down into a simple, easily communicable unit." Likewise, marketing messages can be constructed as memes to communicate the benefits of a product or service more quickly and easily.

After reading Ayling's book, I realized that I had long been using a marketing meme to introduce my service: "I help service businesses attract more clients." When I explain my work that way, I frequently get an immediate "Oh! That's what I need!" response. I've used this tagline for years, but I never really understood exactly why it worked so well. The idea of marketing memes gave me the key. (See more on this in Chapter 5, Packaging Your Services – Verbally.)

The meme in action

A marketing meme always accomplishes four things:

- It actively transfers specific information.
- It's immediately and obviously beneficial
- It's self-explanatory and ultra-simple.
- And it's easy to replicate in someone's mind.

When all of these elements are in place, it works like magic. If they are not in place, then your message may tend to ramble, seem unfocused, not be clearly beneficial and be hard to explain. And I'm willing to bet that this happens all the time when someone asks you about your InfoGuru business.

This is why it's smart to apply marketing memes to virtually any marketing message – people will understand you more quickly and, as a result, you'll attract more attention, interest, and response. You don't have to worry about zippy slogans or phrases. Just strive for clarity, simplicity, brevity and benefits, all wrapped up in a few words (or a combination of words and images). Great marketing memes make a direct and memorable connection.

What a marketing meme is not

Sometimes it's easier to understand a marketing meme by looking at what it is not. A meme is not a meaningless slogan, nor a clever play on words. Ever see a headline on a billboard that totally confused you? That's a dead meme. Memes should never confuse. They should clarify. With a meme you say, "I get it!" When it's not a meme you say, "huh?"

> Let's look at a recent example, a billboard from IBM: Two tires in profile. Two ThinkPad portable computers in profile inside the tires. The headline: "ThinkPad. Road Trip." Huh? Sorry, Big Blue, but that's not a meme. What's the message? I have to stop and figure it out. It's not immediately obvious and beneficial.
>
> Here's an eTrade billboard that's much better: "This month, someone's going to win the lottery. Just not you. eTrade." Bingo! Without having to figure anything out, you get the message: "I'd better stop wishing and start investing." Like a good joke, it hits home immediately.

Slogans, headlines, taglines and other marketing messages aren't necessarily memes. Sometimes they're just clever phrases built on a play-on-words, or they're so general that they communicate very little. "Overnight Delivery" isn't much of a meme. On the other hand, "When you absolutely, positively, have to have it overnight" built a multi-million dollar business. Your challenge is to create memes for your business that communicate the benefits of your service just as powerfully.

Embodying your core marketing message

A meme can be used anytime you need to communicate effectively about your business. Remember, a meme communicates quickly and effortlessly in just a few words (or sometimes in words plus images), the benefit is obvious and it stimulates a response, either immediately or sometime in the future because it's so easy to recall.

And remember that your meme needs to embody your Core Marketing Message. That's the raw material you use in creating your meme.

Finding your core solution

For instance, a recent client, a personal organizer, was struggling to position her organizing practice. She had fallen into doing the kind of organizing that

didn't excite her much. I asked her what was special about her business, what made her different from everyone else. She said that, unlike most organizers who helped people throw out a lot of junk, she had an eye for valuable items that they could sell instead of putting in the garbage. We emerged with a wonderful tagline meme that said it all: **"We find treasures in your clutter."** This has an immediate appeal for those who want to get rid of clutter because it promises an added bonus – finding a valuable treasure or two. Using this meme as her central marketing message, she built on it in her marketing materials by telling of the treasures she had found for others and how finding just a few valuable items would pay for her services.

There are several ways to use memes in marketing your business. Here are some of the major ones: The actual Name of your business; a Tagline (as outlined above) to use with your business identity; an Audio Logo (a short version of an "elevator speech") which you say out loud when someone asks what you do; a Headline on an ad, flyer or letter; and a Title to a talk or an article. All of these memes might be expressed slightly differently but they all communicate essentially the same message with clarity and impact.

Cooking up your meme

So how do you create a powerful meme for your business? It's a bit of an art but here are some guidelines: First, ask the key question – "what do my clients get as a result of using my services?" Don't worry about the wording yet, just brainstorm a number of sentences that capture the gist of your key benefit. You might even do this with a small group. Initially you might come up with: "Our clients have problems with employee conflict and our services help reduce that conflict while building cooperation and trust." So the core idea is there, but it's pretty long.

So start paring it down to its essentials. The next cut might go: "We reduce conflict while building cooperation." This is better but I'm not sure if this is for individuals or organizations. The next attempt yields: "Reducing conflict and building cooperation within organizations." But are we trying to say too much? We have a message that is both about solving a problem and offering a solution. Maybe we should go with one or the other. The final meme, used as a tagline is: **"Building cooperation within organizations."** Now this is simple, benefit-oriented and easy to remember. You've got a meme!

Testing your meme – Is it any good?

Once you've developed a meme, you need to test it to see if it really does communicate your core message. How do you know that? When you get a favorable response when you use it. You notice that when you say it, people ask the right questions and want to know more. The best way is to try this as an "Audio Logo." When someone asks what you do, say something like: **"I have a company called Working Diplomacy. We help build cooperation within organizations."** If most of the people say, "that's interesting, more companies need that," or "you ought to talk to our HR director," there's a very good chance you have a winner. If, on the

other hand, everyone says, "what do you mean," or "why do companies need that?" you may be off track. Back to the drawing board.

Rolling out your meme

A meme isn't just a nice thing to have. It's the core expression of your business purpose and strategy. So you want to use it everywhere you possibly can. Put it in the tag line of your business card and stationery. Use it as a headline in an ad, answer the phone with it: Prospect: "Hello, I hear you folks do conflict management for companies." You: "Yes, we help build cooperation within organizations. Is that what you're looking for?" The whole idea of a meme is that it helps prospective clients understand quickly and easily how you can help them, so you want to include it in every single piece of promotional material and in all the marketing activities you do.

You can also be an expert at "Meme-Ology"

With a little work, anyone can create a powerful meme for their business. It all starts with a core idea: What are the results you produce for your clients? Next you need to hone it down to a few words and make it as simple as possible. Finally, you need to apply it to several marketing messages. When you get the hang of constructing good marketing memes, it's like riding a bicycle. In the same way that it's virtually impossible to lose your balance, it will be impossible to construct a meme that doesn't hit home every time.

Action Plan – Positioning

Take the elements of your Core Marketing Message and put it into the form of a meme for different marketing situations and purposes.

1. Audio Logo (what you say when people ask you what you do) – We'll cover this in more detail in Chapter 5, Packaging Your Services – Verbally.
2. Tagline for cards and letterhead
3. Telephone message
4. Headline for brochure, talk or article

Books on Positioning, Core Marketing Message and Marketing Memes

Positioning – Trout and Ries

Rapid Response Advertising – Geoff Ayling

These and other books can be found online in the Action Plan Marketing Bookstore.

Notes

Chapter 4

Positioning *– Zeroing in on Your Target Market*

Who are Your Best Clients and How do You Find Them?

Let's review some of the ideas on targeting clients from the first chapter on Positioning. We said we needed to know who buys your service, what they are actually buying, when they buy and why they buy. We also suggested you differentiate your clients with two broad categories to start: Demographic and Psychographic.

But first, why is it so necessary to identify your potential clients so specifically? Two reasons. One, if you know exactly who your potential clients are, then you can more effectively zero in on them through your various marketing efforts. Second, by clearly identifying who you work with, your potential clients will identify themselves.

The first one may be the more obvious. If you don't know who or where your ideal clients are, you won't know where to network or speak or mail. So by all means focus on this one.

But the second one is just as important. In fact, many positioning strategies are built on the simple fact that the services sold are for a particular category of buyers. And just by emphasizing that point, you get an automatic "that's for me!" response.

For instance, for years I've been promoting my services as "I help Professional Service Businesses attract more clients." By saying who I help I get the attention of the right people. If I sold generic marketing services: "I help you attract more business," then you'd need to dig a little further to see if I could help you specifically. And since people like to buy from specialists, I'm ahead of the game.

If you realize that all your clients are in a certain type of high-tech business, **remember to emphasize that in all your marketing materials.** Or if they all have a specific kind of problem or belong to a certain organization, then emphasize that.

There are many angles you can use to zero in on those ideal clients. Here are what I consider to be the most important ones.

Demographics and Psychographics

Zeroing in on your target market can be one of your most powerful positioning strategies. It also sets the stage for launching effective promotional campaigns. Let's look at Demographics and Psychographics as they relate to your target market.

Demographics are all the basic facts about your clients or prospects. These are simple objective facts about where they are, the kinds of industry they're in, size of company, etc. If you deal with individuals, it means gender, age, income, education, etc. Demographics deal with the exterior, measurable information about your clients.

Psychographics are important as well. It's the character, the philosophy, the inner workings of your clients and prospects you're looking for here. It's the adjectives you'd use to describe your clients: innovative, integrity, leading-edge, etc. Psychographics deal with the interior, not-so-easy-to-measure information about your clients.

Both Demographic and Psychographic selectors can be used to identify your best clients. Knowing these will help you refine your message and speak directly to their needs.

Demographics	Psychographics
Industry	Company mission/philosophy
Size of company	Management style
Geographic location	Reputation in industry
Annual revenues	Commitment to training/education
Who their customers are	Hiring practices
Age of company	Litigation history
Gender balance	Level of integrity
Age of average employee	Awards for excellence
Who you sell to in company	Community involvement

Depending on the service you offer, any and all of the above selectors could determine the way you go about targeting your clients.

So with the above selected you might have something like this:

Demographics

Our clients are large semiconductor companies in the Silicon Valley area who have been in business for at least five years and whose market is at least 50% international. Our main client in the company is the VP of marketing.

Psychographics

Our clients have a very high standard of excellence and integrity. They also have a reputation for innovative products. Their management approach is informal yet well-organized. They pride themselves on achieving high profit levels. They are involved in community projects and have received many awards in this area.

Action Plan

Get the idea? Now create your own. Really think who your ideal clients are. If you don't know, how are you ever going to market to them?

Problems and Opportunities

You need to create a "personality profile" for your ideal target companies based on the criteria above. You then need to look at Problems and Opportunities your target clients should ideally be experiencing or interested in to be qualified for your services. Here is a sample list of possibilities:

Problems	Opportunities
Low profits	Increased profits
Ineffective processes	Effective processes
Poor communication	Good communication
Ineffective management systems	Effective management systems
Unclear strategic direction	Clear Strategic direction
Not enough clients	More clients
Expenses too high	Expenses in line
Inappropriate compensation	Appropriate compensation

Realize that some potential clients will be thinking from problems (more likely a higher percentage) and some will be thinking from opportunities. Your marketing message will vary depending on whether it makes more sense to focus on problems or on opportunities.

Your Problem/Opportunity Profile might look something like this:

Problems

Not as successful as they'd like at marketing their products. Emphasis is more on technology than marketing and developing products before a market has been identified. Are losing market share to less technologically competent companies.

Opportunities

Want to become the market leader in their field. Want to optimize the relationship between engineering and marketing. Want to increase profitability.

Action Plan

OK, time to do yours. What problems and opportunities are there for your target clients?

Points of Client Contact

You also need to determine where these clients are, what they do and how you can zero in on them through your future promotional activities. Here are some questions to consider.

- What organizations do they belong to?
- Where do they network?
- What conferences or workshops do they attend?
- What other professionals provide them services?
- What magazines or publications do they read?
- Do they read mail? email? newsletters? reports?
- What web sites do they frequent?
- Who refers them to people like you?
- What directories are they listed in?

You need to point your marketing activities somewhere. Knowing the points of contact for your potential clients are the key. Otherwise the only way to market to them is to call them directly and, as I've said, this is not the most effective way to market your services. You want them to discover you through the channels they already are associated with.

Your Points of Contact profile might look something like this:

Points of Contact

Our clients are active in the semiconductor professionals association and usually both attend and exhibit at the national conference. They work with both technical and management consultants. They subscribe to Semiconductor Journal and Semiconductor Weekly. Usually they are referred to people like us from word-of-mouth, either from industry peers or others in their company.

Action Plan

Your turn. Create your Points of Contact Profile for your ideal prospective clients.

Ideal Client Profile

From all the information above you can now create a grid that outlines a more detailed profile of your "ideal client."

Here's an example: This one is based on my own business, Action Plan Marketing.

Demographics	Psychographics	Problem/Opp	Points of Contact
Small, independent business	Intelligent	Not enough clients	Business networking
Consultant/trainer/coach	Hard working	Not enough income	Chamber of Commerce
In business less than 5 yrs.	Technically and academically inclined	Unfulfilled potential	Professional associations
Income 50K - 100K	Motivated to succeed	Frustrated by ineffective marketing	Use the Internet extensively
Late 30's to early 50's	Want to make a difference and a contribution	Have made past marketing mistakes	Go to classes and talks
Their clients are small and large businesses.	Passionate about their field	Tired of procrastinating	Read professional journals
SF Bay area as well as USA	High integrity	Open to getting coaching and consulting	Read local papers
Willing and able to pay for marketing assistance	Fearful of or have problems with marketing	Very results oriented	Listen to local radio

Now take some time to create your own "Ideal Client Profile"

Demographics	Psychographics	Problem/Opp	Points of Contact

Action Plan

There are several ways to use the information from your ideal client profile.

1. Use this information in developing your marketing materials. Make sure to say who your clients are and what problems they have. I recommend creating a one-pager that covers this information as concisely as possible. For an example from one of my clients, Brien Palmer, see the Appendix.
2. Use it to help you determine the best places to promote your services. If you know where they network and what they read, it gives you all you need to target speaking engagements and which publications to approach for articles.
3. When developing new products, always consider your Ideal Client Profile. What would they respond to best and how can you get the word out about this service?

Books on Defining Your Ideal Clients

Nichecraft – Lynda Falkenstein

Positioning – Trout and Ries

Focus – Al Ries

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 5

Packaging Your Services – Verbally

Creating an Audio Logo

In a previous chapter we talked about your Core Marketing Message and Meme. In this chapter we want to look more specifically at how to package that message verbally.

One of the most important tools in the Info Guru's toolkit is an Audio Logo. This is what you say when someone asks you "The Question," You know – "What do you do?" Too many InfoGurus are caught flat-footed with this question. Invariably they label themselves – "I'm a management consultant." Or they talk about their process, "I work with managers and executives on cash flow and distribution."

Remember that the key to success in InfoGuru Marketing is giving instead of getting. And when you're talking in terms of labels or processes, you're talking about what you do, not what people get. People are struggling to understand what's in it for them. So let's explore what does work to get immediate attention and interest from anyone who asks you what you do.

Remember the meme

When someone asks you "The Question" what comes out of your mouth needs to be a meme. Remember what a meme is all about?

A marketing meme always accomplishes four things:

- It actively transfers specific information.
- It's immediately and obviously beneficial.
- It's self-explanatory and ultra-simple.
- And it's easy to replicate in someone's mind.

Now there are actually four ways to talk about what you do. Two don't work at all. One works to some degree and one works very powerfully. Here are what they are and how they work.

1. **Your Label.** This when you say, "I'm a management consultant" or I'm an accountant" or "I'm an executive coach." This is how the majority of people introduce themselves.

What's the problem with this? What you mean and understand by your professional label is not necessarily how your listener understands this label. When you say "management consultant" they may have no idea of what you do or how you can help a business. If you say accountant they may have a knee-jerk response that accountants are nothing but bean counters. So your label as a marketing message simply fails to get the attention you want.

2. **Your process.** This is what you do. And many people spend a lot of time talking about this in answer to the question.

   Why does this also fall flat? Processes tend to be boring unless we can create a direct link between the process and the benefit or advantage I'll receive from utilizing that process. The problem is, most people won't make the leap. So if a management consultant says: "What we do is training programs that help integrate the values and mission of the company by using role playing exercises based on the work of James Ruben." Yawn. OK, but what do I get as a result of all that? Most leave that out altogether.

3. **Your solution.** This is much better. In fact, in many situations these can work. They at least do talk about a benefit. The generic form of an Audio focusing a solution goes something like this:

   I help (or work with, or assist) _____ (name the target market you work with) _____ (name your solution.)

   Mine might be the following: "I help professional service businesses attract new clients."

   Let's try a bunch of them for different businesses:

   - I work with aerospace companies to improve their employee retention.
   - I assist people with back problems get back to work and back to better health.
   - I help banks increase their number of business loans with start-up companies.
   - We work with companies that have conflict and help restore a better working environment.

   This is usually as far as people get with an Audio Logo – a good solid solution statement. But wait, there's one more way to talk about what you do and it's much more powerful than talking about the solution you provide.

4. **Their problem.** Notice that all the other three were about your label, your process and your solution. But people are much more interested, not in you and your stuff but themselves and their stuff.

   The purpose of your solution is to solve their problem. So why not talk about their problem first? You can take every one of the Audio Logos as stated above and turn them around.

   I help (or work with, or assist) _____ (name the target market you work with) who are – struggling, having problems with, etc. – _____ (name their problem.)

- I work with aerospace companies that are tired of losing money due to employee attrition.
- I assist people with nagging back problems that they've been putting up with but just can't seem to get rid of.
- I help banks who have the capacity for more loan portfolios but don't know how to increase them.
- We work with companies who are frustrated that they are losing productivity and collaboration because of conflict.

Notice that the target market is the same, but instead of a solution you've inserted a problem. Why does this tend to work to get more attention than stating the solution first? As I said, that's where people's minds are. They are thinking about problems. If a chiropractor comes up to me and says he helps people have healthy backs, I don't have much of a point of reference. After all, my back hurts all the time! But if he says he helps people with backs that hurt all the time, I'm all ears.

But can't people translate a solution to their particular problem? Of course, and they do. But why make them work to relate what you do to what they're looking for? The headline, "Have Dirty Carpets?" will almost always get better response than "Have Clean Carpets!" After all, you get tired of seeing those dirty carpets every day. You think, "Yes. I have dirty carpets, I guess they can get them clean for me."

By the way, my problem-oriented Audio Logo is:

"I help Professional Service Businesses who are struggling to attract clients."

The difference is subtle, but it works a lot better.

What are some of the pitfalls in delivering an audio logo? Where can you go wrong or get struck out?

I think the biggest mistake people make is trying to hit a home run with their Audio Logo instead of just trying to get a base hit. They are so concerned that they say just the right thing that they try to say everything. The response they are looking for is something like" "WOW!!! you do that??? That's great!!! Gosh, we have a half million dollar budget for that type of thing. I hope that's enough; can you come over today and help us out?!"

Let's get real. That's unlikely to ever happen. Yet we are often so insecure about communicating about what we do that our expectations are totally unrealistic. On the other hand, we think that if we speak about our business in any way at all, that we are being too pushy so we just say our label, "I'm a management consultant," and hope they'll ask us some relevant questions.

The other big mistake is that once we have some attention and interest, we tend to "blow our wad" and talk about what we do non-stop after we get a question. The solution to that is pretty simple – ask your prospect what they do and have them tell you more about the problem. Keep the focus on the prospect, not on you. You'll find that people are only too happy to talk about their problems!

How important is an Audio Logo really, and what are some of the situations where you can use an Audio Logo?

Your Audio Logo is not just important, it is the very key to all your marketing messages. It's not just a clever marketing phrase. It really means something. By expressing it as a problem, it really demonstrates that you know who your clients are and what they need. You can use it in a wide variety of situations.

In a networking setting where people are meeting for the purpose of doing business such as a professional association or chamber of commerce.

In a social situation. Everyone asks everyone else what they do. Be prepared with your Audio Logo.

When someone calls you on the phone. If your audio logo as a designer is "We work with companies who are not satisfied that their visual identity and marketing materials are helping to grow their business" then use that when someone calls to ask you about brochures: "Hi, do you do brochures?" Your response should be: "We work with companies who are not satisfied that their visual identity and marketing materials are helping to grow their business. Can you tell me what you're trying to accomplish with your brochure." If all they are looking for is the lowest price, you're better off ending the call right there.

On your phone message. Many people say this: "Hello, this is Janet. I work with companies who are not satisfied with their current employee retention rate. I'm not in now. Please leave a message after the tone." Who knows, you might get a call from someone with that problem. And if nothing else, you are consistently communicating your message to whoever calls.

Action Plan

Write an Audio Logo using this problem format. Simply say who you help and what problem you help them with.

Follow Up With The Solution

If you use a problem-based audio logo, you're more likely to get attention, and the person who asked you the question in the first place is likely to ask you something after you've answered. They'll say, "How do you get rid of back pain?" or "How do you reduce attrition?" And now you have a different kind of attention than if you lead with a solution in the first place. They are more interested in what you have to say.

So you need to come up with a solution statement that's value-based. And you need to watch that you don't answer with the process that you employ to get those results. This is tricky. Let's look at the difference using the example of the aerospace company with attrition problems.

Process-Oriented Follow-up

"We provide workshops and consulting services to help our clients reduce their attrition."

OK, that's accurate but it's not very interesting or benefit-related is it? You sound like any number of consultants who solve various business problems. Instead you need to answer in a way that gets them even more interested. You do this by talking about benefits instead of processes.

> **Benefits-Oriented Follow-up**
> "We reduce attrition by helping our clients get to the heart of why employees stay in the first place. We've found that most companies are only addressing symptoms. We help our clients build a loyal workforce that becomes more competitive."

Now an answer like that is liable to initiate an interesting conversation! You're not talking about your process but your underlying principles, and how you work to not only reduce attrition but to improve the competitiveness of the company. Now I'm interested! You can also take the problem and expand on it just as successfully. This will usually generate more questions from a prospect.

> **Problem-Oriented Follow-Up**
> "We work with companies who are experiencing high levels of attrition, but they don't know why people are leaving. A lot of companies are focusing on the wrong things and throwing money at solutions that really don't address the problem."

It is extremely rare that you'll meet a professional service business owner who can answer a question about their business like this (either solution- or problem-oriented answer). Most jump into boring descriptions of process at the drop of a hat. You need to resist the temptation by thinking seriously about what you really do for your clients. If you simply think of someone who provides workshops and consulting, why should they hire you instead of someone else?

Action Plan

Create A Solution Statement that communicates benefits, not processes. You really need to ask yourself what solution you're providing for your clients. The success of your business depends upon it.

Tell Them a Story

Even if you're talking about problems and solutions, things can still come across as abstract or conceptual. You'll get more understanding and buy-in if you use stories to underline the benefits and advantages that your services offer.

The first thing people want to know after understanding you have a solution to their problem is, "Does this really work?" Stories are a simple way to demonstrate that. You can start all your stories in the same way: "We recently worked with a client who..." then tell your prospect three things:

1. **What the situation was before you worked with the client:** "They couldn't get buy-in from top management on major initiatives and they were frustrated because things were really bogged down." Of course, this is very much like your audio logo where you talked about a general problem.

2. **What you did for them, without going into too much detail.** This is key. You don't want to get bogged down in process. "We worked with them in a program that showed them how to get that buy in three times faster and five times more frequently." Anytime you can throw in credible figures, make sure you do so.
3. **What happened as a result of your work.** "After we had finished working with them they moved ten initiatives forward in three months, a record for them. And getting things rolling took an average of two and a half meetings instead of eight. As a result they'll launch new business that will bring them $20 MM next year."

See the logical transition? From your Audio Logo where you got attention, to your benefit statement where the advantages of your services were spelled out, to stories where you actually demonstrated what you did and what the results were. Now your prospects know a **lot** about what's in it for them. You have given them exactly what they wanted and now they want to know even more.

Action Plan

Develop several stories about successful projects and successful clients. Keep them to about a minute. Make sure they hit home the results you produce with your client.

There's one more step.

Unique Competitive Advantage

One of the other questions that stymies many professional service businesses is, "What makes you different than the other people who do what you do?" Good question, and a legitimate one. After all, if you're pretty much the same as everyone else, why should they be interested in you?

You need to remember that you do have competition. You're not the only game in town. And even if you provide a good solution to their problem, you need something to make you stand out. Your Unique Competitive advantage tells your prospect that there are special advantages to doing business with you that your competition does not offer.

There are many, many ways to differentiate yourself with a Unique Competitive Advantage.

- Your track record and list of clients
- Your unique approach that gets better results
- The targeted market you serve
- Your guarantee of satisfaction
- The extra value you provide
- Specific deliverables in the area of quality, service or price

Let's look at all of these because they can all be utilized successfully as Unique Competitive Advantages.

Your track record and list of clients

If you are a successful business that has been pleasing clients for years, make sure your prospects know exactly how you've been pleasing them. You should have several stories or case studies to relate that prove you deliver what you promise. Stories are powerful. There is nothing better to persuade someone.

Many people choose a company based on its track record above everything else. They want to know who you've worked with, what you did for them, how you served their unique needs and how you solved problems. They want to know that you are competent, reliable, trustworthy and responsive. If you are all of those things, don't hide them under your hat! Tell your prospects in your marketing materials, on your web site, and even verbally.

Your unique approach that gets better results

In the section on Positioning – Your Core Marketing Message I gave an example:

> "Other outplacement firms use a psychological model that assumes there's something wrong with you if you got fired. We use a marketing model that helps you get back into the job market as quickly as possible."

Let's look specifically how this was expressed verbally:

Many years ago when I was starting my business I met a man named Joe Meissner at a networking event I was hosting. I asked Joe what he did. He told me he was in the outplacement business, and explained that outplacement consulting meant working with "displaced executives" who lost their jobs, usually due to downsizing or mergers. His solution was that he worked with these executives in the job-search process until they got solid job offers.

So far so good. But there are many outplacement consultants who did pretty much the same thing. But Joe had a unique approach to his business and he was quick to point it out to me. "Most of the outplacement firms use what's called a "psychological model." That means they take the point of view that if you lose your job, something is wrong with you. They bring you in, do a lot of psychological testing, give you an office space and try to build your self-esteem. But they don't offer a great deal in terms of actual job search skills."

> **Joe continued, "In today's job market I feel that approach is nonsense!** People aren't getting laid off because there's something wrong with them but because the job market is more volatile than ever before. We take a completely different approach to outplacement. We use a marketing model just like Proctor and Gamble. We help our candidates work on their 4 Ps – Product, in the form of a great resume, Price in helping them with salary negotiations, Place in how to get in front of the right people and Promotion in how to get the word out consistently. This method gets people jobs a lot faster and our clients are happier. We named our company "Power Marketing, the Outplacement Alternative" to differentiate us from all the psychologically-oriented outplacement firms.

Was this strategy successful? You bet it was! Joe built a practice worth over a million dollars with only a small staff in just a few years. It wasn't luck. When Joe went in head-to-head competition with the big outplacement firms, he won the contract nearly every time! His clear differential, that had definite benefits for the client, got their attention and the contracts.

Joe has gone on to create a new division of his company called "Executive PR" and is leading the way once again.

The targeted market you serve

My business, Action Plan Marketing, has a less distinct Unique Competitive Advantage, but it's also been very successful. Many years ago, I positioned myself as the one marketing firm that specialized in working with Professional Service Businesses. Since very few marketing companies specialize in this area, it makes me stand out. When people visit my web site it speaks to them directly. It says, "Action Plan Marketing knows your business and your struggles to attract clients. We can help you." As a result, almost all of the calls I get are from very qualified clients. I don't need to do a lot of selling as they are already presold.

If you sell exclusively to a specific market make sure to discuss this in detail. Let them know what you know about their industry, how you are involved, who you work with in that industry, etc. Affiliation is a very powerful UCA. People like to hire people who specialize in their field. They feel that you can give them better service. They don't feel they have to always be educating you. The good news is that this category of UCA is often the easiest to use and definitely one of the most effective.

Your guarantee of satisfaction

The purpose of a guarantee is to reduce the perceived risk to the prospect of buying your service. If you can promise in very specific ways how they cannot lose by working with you, you are ahead of the game. Many people are looking for guarantees before they spend their hard earned money.

The challenge in selling professional services is that a money-back guarantee is not a very good idea. It would be in many cases very dangerous to offer this. You don't give away the store. If you know you can increase performance, for instance, then offer a guarantee that promises an increase in performance but only if they follow through with your recommendations. Then look at what an increase in performance might mean to their bottom line. If this savings is considerably less than your service fee, then you have reduced their risk.

Example: (in general terms)

> Our services are about increasing performance in your company.
>
> We have noted that when our program is implemented fully, it typically results in a 15% increase in a company's net profit.
>
> All we ask from you is that you follow our program closely. If you do so, we guarantee a minimum increase in your net profit of 10%. In a company with a million dollars in sales this translates to $100,000 per year.

> If we do not accomplish this level of improvement we will continue to work with you at no additional cost until you do.

Of course, your specific guarantee could be different than this. You need to design something that works for you. Ask yourself a simple question: If I delivered everything possible to get the desired result, and if the client followed through on their end of the deal, what guarantee could I offer? If every client has been 100% happy with your service, what do you possibly have to lose by offering a powerful guarantee?

I learned about this approach from a tape by two people who were offering sales training. Their guarantee was just as stated above. But they went one step further. If clients tried to reduce their price or cut back on the sales training program they said they would be happy to do so but that they could no longer offer the guarantee. Since people love to cut back costs but are reluctant to cut back on value, the largest percent of prospects decided to go with the full guaranteed program.

The extra value you provide

This is a great Unique Competitive Advantage if you offer a parity service that is very price driven. Say you sell advertising specialties. Everyone offers pretty much the same thing. The prices are all in the same ballpark. But you can add value to that service. You could add a certain amount of marketing consulting services for free. You could offer a detailed plan for using your ad specialties at a trade show. You could do a study of the most effective ad specialties and have a 10-point plan on how to use each one in a way that got the best response.

When you add value to a service that is often seen as a commodity, people start talking about you because of the value you add. That's what's memorable. And when people ask you about your business, you could actually position this value right into your audio logo. For instance, using advertising specialties:

> "We work with companies who are tired of being sold ad specialties that are just like everyone else's."
>
> Oh, what makes you different?
>
> "We offer the same specialties, but people get something extra when they work with us – a complete marketing action plan for each specialty we sell that is proven to get the best bang for your buck."

Services that can take advantage of this are any service that is perceived as a commodity, including accounting, bookkeeping, word processing, executive search, printing, etc.

Quality, Service and Price

Many businesses try to differentiate their business with one of the old standbys: Quality, Service and Price. What's the problem with that? Simple. Everyone needs to have good quality, excellent service and a fair price. If you don't have these, you're no longer in business.

What is interesting and attention-getting is talking about quality, service and price very specifically. If you pride yourself on great quality, how can you

quantify that quality? Perhaps you offer a guarantee and emphasize that nobody has ever taken you up on it. I once knew a bookkeeping company that boasted that they had never lost a single client. Now you're talking quality in a way that I can relate to.

If you focus on service, quantify it again. Define what you mean by service: "We do a one week turnaround max on all web site design. Once we have your web copy in hand we will produce a minimum of three designs that fit your criteria – all within a work week. If we don't meet the one week deadline, we reduce our fee by 5% for every day that we're late." See how that promise of service reeks of confidence. Wouldn't you rather deal with this company than one that said, "We'll try to get you a design or two in about a week."

Finally, if you discuss price as your unique competitive advantage, make it very specific as well. Most professional services, by the way, should not compete on price. Better to emphasize the first two. But some should actually emphasize that they are the most expensive! "Jay Abraham, the most expensive marketing consultant in the world." That got him a lot of notoriety.

The lesson in all of this? Think carefully about your Unique Competitive advantage and use it as the cornerstone of your marketing. Your Audio Logo gets you attention and starts the conversation. The Unique Competitive Advantage is what makes you memorable and valuable.

Action Plan

Create A Unique Competitive Advantage for your Business. Think of the advantages you have in your approach, your results, your guarantee, your target market. Write it down.

To Summarize

- Create a Problem-oriented Audio Logo.
- Develop a solution statement that talks about Benefits, not Processes.
- Prepare stories that prove your claim of results.
- Formulate a Unique Competitive Advantage that really makes you stand apart.

Go to the Audio section of this manual and download the Real Audio TeleClass on creating Audio Logos. If you have any confusion or difficulty with Audio Logos, this will show you exactly how to do it successfully.

Books with sections on "Audio Logos"

Marketing Your Services – Anthony Putman

Power Networking – Sandy Vilas

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 6

Packaging Your Services – In Writing

Why You Need Marketing Materials

There are two purposes for your marketing materials (or brochure) – to sell your prospective clients and to sell yourself. In the process of creating your materials you gain clarity about your services that can be gained in no other way. By taking the time to write down exactly what you do and the benefits of your services, you are then able to talk about your services more persuasively.

People do read marketing materials. If people are buying an expensive service, they are interested in knowing exactly what they will get. People who are not prospects will generally not read your materials, but those who are prospects will not only read them, but will often go over them several times.

The biggest problems with marketing materials

Marketing materials are often poorly done. Here are the top four problems with materials:

1. **Wrong orientation** – focused on what we do, not what you get
2. **Insufficient content** – not enough information to persuade
3. **Poor layout or design** – poor impression and makes them difficult to read
4. **Typos and grammatical errors** – damages credibility

In this chapter we'll look at each of these problems with marketing materials and give you guidelines to improve them greatly.

How marketing materials are used

There is more than one way to use marketing materials effectively. They include the following:

1. Mailed to a prospective client once they have called you.
2. Mailed to associates with a cover letter to inform them of your services.
3. Taken with you to the first appointment with a prospective client.
4. Available on the web for prospective clients who have called you or have been referred to you.
5. Available on the web for prospects who find you on search engines, etc.

For the most part, marketing materials should not be mass-mailed as the

initial introduction to your services. This is a colossal waste of time and money. You'll learn to use other promotional methods to get the attention of prospective clients much more effectively.

Marketing materials inform, educate and sell those who have already expressed an interest in your services. In the case of a web site, your information is there and available for those who have already heard of you or for those who are seriously searching the web for your kind of services.

Creating An Executive Summary

Good marketing materials should start with an "Executive Summary" that gives a clear overview of what your business is about.

Here are the five elements of an executive summary:

1. **Problem** – Make it crystal-clear that you understand what your prospects are experiencing by discussing their problems, pains or predicaments.
2. **Solution** – Discuss what's possible or what things will be like when your prospects' problems are solved.
3. **How come?** – Discuss why your prospects are stuck in #1 and not doing #2.
4. **What you need to do** – Discuss the basic steps necessary for your prospects to resolve their problems.
5. **Call to Action** – A statement of who you are, what you do, how you can help, and an invitation to the prospect to pick up the phone.

Applying the formula to your marketing materials

One of the biggest mistakes I see with clients is that they start with #4 and #5 first. They tell everything they do to solve the problem before there is agreement that there is even a problem to solve.

And you wonder why people are not interested in what you do. Well guess what, they aren't! They first want to know that you understand their situation and then they want to know how you can help them.

This Five-Step model provides the perfect template for simple, direct and persuasive marketing materials that do just that. It gives you the format for creating an Executive Summary about your business and your services that speaks directly to the needs of your prospective clients.

Your Executive Summary can be printed on one or two pages and can serve as the first part of a complete marketing package. The same format can be used for the opening text on your web site's home page.

Here's an example using this Executive Summary format with an IT consulting company.

First, a headline with your Core Marketing Message.

"We help IT companies retain their best talent."

1. **Problem – Tell them what's not working.**

   "These days, the biggest challenge in big IT departments is keeping talented staff. In a survey of the 20 largest IT departments in banking, for instance, the average attrition rate is 27% per year, costing each organization over $3.8 million in recruitment costs annually."

2. **Solution – Tell them how it could be.**

   "Research also proves that the top reason for attrition is not poor compensation or lack of challenging work, but poor management by those directly above them. The good news is that when management approaches change, people stay, saving companies hundreds of thousands, if not millions each year."

3. **How come? – Why haven't you already solved this?**

   "Highly competent technical people are the ones most often promoted to management positions, however they only receive in-depth management training 16% of the time. This leaves 84% of those in technical management positions with few skills in the area of people or project management.

4. **What you need to do – An approach that's proven to work.**

   "The best investment IT departments can make is providing in-depth management training and coaching. It is the number one defense against attrition, low productivity and declining morale. Such training needs to be seen as an investment, not as an expense, as it can show a return of 500% or more."

5. **Call to action – Prove that you can help them.**

   "Since 1987, IT Management Solutions has been helping some of the largest IT departments in America attract and retain top talent by developing top management and teams through our guaranteed consulting and training services. Please give us a call to discuss how we can help you with your IT challenges."

Another example, with subheadings

Since I'm closer to my business than to any other, I'm also going to give you an Executive Summary example using my business. All you need to do is adapt it to your business. I also include the actual subheadings for each of the sections.

Not Attracting Enough Clients to Your Business?

Do you continually struggle with marketing? Do you love performing your service but find it a real chore to do the marketing necessary to attract new clients? And if you've done various marketing activities, have you found the response to be less than you hoped for? When you get a lead to a good potential client do you find that you don't convert a large percentage of them into paying clients, and if you do convert them, do you often not get paid what you feel you're worth?

You Can Learn How to Magnetize Clients to Your Business

Marketing really shouldn't be a struggle. The marketing side of your business should just be as easy and as fun as performing your services. Of course, you'll find it a lot more enjoyable and rewarding if your marketing activities result in prospective clients calling you, ready to work with you. And you'll be a lot more enthusiastic if most of those prospective clients turn into clients that pay you what you're worth every single time. Sound impossible? It's not.

If It's So Easy, Why Haven't You Done It?

Successful, effortless marketing starts with an understanding of how marketing actually works. Because we think of marketing as "trying to get something" instead of "giving something," our marketing efforts make us feel like "used car salespeople." No matter what techniques or strategies we apply (even if they're the right ones), we usually fall flat on our faces because we have the wrong "Marketing Mindset."

Master a Five-Step Process to Magnetizing Clients

Successful marketing starts with a mindset that understands how people are attracted to us and buy our services. Then it's a matter of working with the fundamental principles of service business marketing. I call these principles the 5 Ps – Positioning, Packaging, Promotion, Persuasion and Performance. All of these 5 Ps are about communicating the value of your services in such a way that people see what's in it for them.

Action Plan Marketing Has the Expertise and the Tools

Robert Middleton of Action Plan Marketing has been helping professional service businesses attract new clients since 1984. Robert has helped hundreds of business owners through consulting and coaching, workshops and tape programs as well as developing marketing materials and web sites. If you'd like to learn more about how Robert can help you start attracting more clients, please give him a call. He'll be happy to discuss your situation on the phone at no charge. Call 831-338-7790 or visit the Action Plan Marketing web site at www.actionplan.com.

So, I hope that's clear! Are your services presented in a way that makes it easy for people to know why they need you and how you can help them? This Executive Summary format is a way to expand on your Core Marketing Message and communicate the most important information about your services.

Action Plan

Create your own executive summary of your services by following the basic outline above. This is one of the most important "marketing acts" you will perform in your business. Don't take another step until you've done it. Remember, it's not an academic exercise. This summary becomes the foundation of your marketing materials. You can print it on a page or two and hand it out to potential clients. You can shorten it somewhat and put it on the first page of your web site. You can edit it and

turn it into a 3-panel brochure. For many, an Executive Summary is the only marketing material they use.

Build a COMPLETE Case for Your Services

Once you have developed an Executive Summary on one or two pages, you usually need to augment your materials with more information to build a solid case for your services.

Your prospective clients are always asking "What's in it for me?" and if you don't answer that, they'll lose interest in your services. So every part of your materials needs to point in that direction.

Here are the main sections to include in your marketing materials

- Executive Summary (as outlined above)
- Are These Services for You? And Why do You Need Them?
- List of Services
- List of Clients
- Case Studies
- Testimonials
- Background Information on You
- Call to Action
- Articles and Supplementary Material

All of these sections should have at least one page, and sometimes several. I know it may seem like a lot of materials, but consider this: Everyone sorts information differently. Some are more process-oriented, some are very results-oriented, some are status-oriented, some are relationship-oriented, some are security-oriented and others are information-oriented.

You need to have material that will appeal to all types.

Process-oriented – list of services, how you work with clients

Results oriented – case studies, testimonials

Status-oriented – list of clients, media appearances

Relationship-oriented – background on you and company

Security-oriented – who are these services for?

Information-oriented – articles, case studies, list of services

In fact, most people have a combination of the above orientations. So they may be interested in several sections of your materials. Few will read everything. Most will read something. If you leave out a section because you yourself never read that section in others' materials, you are making a serious mistake!

A proven fact: People will read what interests them and they will read even more if you make it interesting.

Now let's look at the different sections of your marketing materials. What

should be included and how do you present it?

Client Profile – Who you work with

Someone learning about your services for the first time might not understand if these services are for them. Why would they need these kinds of services, let alone why should they buy them from you?

This is covered in the Executive Summary but, in many cases, it pays to explain in more detail the who and why of your services.

Aren't you attracted more to services that are custom-tailored to you? Ever notice that many services (including mine) mention their target market in their message?

> "Helping Professional Service Businesses Attract New Clients"
>
> "Lifetime – The Women's Network"
>
> "Apple – The Computer for the Rest of Us"
>
> "Helping Creative People Get Organized"

This information is already at the forefront of your marketing materials. In this section of your materials you can go into this in greater detail, explaining exactly who you work with, what their problem or issues are and who an ideal client is for you.

Who you work with

Let them know who your services are for. Don't be concerned that you are narrowing your market too much. People want to know that you understand them and/or their business. Here you want the basics – demographic information.

> "The clients we work with tend to be VPs of marketing in high technology firms, mainly in the Silicon Valley Area of California. Projects that they are working on include initial product launch, advertising and publicity campaigns, customer referrals programs, etc."

What their problems are

In the same section you can also explain in more detail why they might need these kind of services. The best thing is to come back to the problem, pain or predicament that they are experiencing and explain how you provide a solution to that.

> "Our services were designed for managers who need better results from their employees but don't know the most effective strategies for building cooperation and teamwork. Some of the symptoms of that unproductivity include: conflict and disagreement, projects that are always late, lack of initiative... etc."

The ideal client

Finally, talk about what a good client is for you. If you are very clear what kind of clients you want to work with you will tend to attract those clients and eliminate those you don't want to work with.

> "Clients will be most successful with us if they have some or many of the following characteristics: They are open to change; they realize that if they want different results they need to try new approaches. They are action oriented and committed to getting things done. They are good communicators who place a high value on

interpersonal relationships."

I want to emphasize that these examples, like all the examples here, are just starting points. Make sure you include everything you can to convey a complete message. Sketchy, incomplete or vague materials will hurt you more than help you.

Approach – How you work with clients

Often your biggest differentiation is how you do what you do. You may have a model, a technology, a philosophy or a style that sets you apart. If you are committed to excellence, let your reader know exactly what you do to demonstrate that excellence. If you have a guarantee, spell out exactly how it works. If you do something different than others in your industry, explain why that difference is an advantage.

Often we take for granted the way we approach our work. We are so close to it we think everyone already understands what makes us different or valuable. The truth is, they don't. You need to spell it out for them using very straightforward language that makes the advantages of what you do crystal clear.

An executive recruiter I worked with differentiated himself from the large multinational search firms by underlining all the advantages of working with a "boutique search firm." The advantages were very clear to him, but when he created a chart with all the differences clearly spelled out, his clients really had a fair basis for comparison.

Information on your services

This is where you explain how you do what you do. This can be the trickiest area of your materials because you're in your element here, not your client's. They can be confused by your "tech talk" or industry jargon. Your objective here is to simply explain the various steps you go through to deliver your service. These are the features that tie into the benefits listed above. These features or processes or services are always tangible, always physical. Here's some guidelines:

- Title your services or processes (Executive Coaching Program).
- Outline the problem or issue this service addresses.
- Outline the reason for this service or the key benefits it offers.
- Explain what you actually do or how the service is structured.
- Use specific figures, not generalities.
- Give a "call to action" let them know what they need to do to find out more about this service or to buy this service.

Service packages

Service Packages are simply another way of presenting your services. It is taking the various things that you do and packaging them into "digestible" pieces that can be easily comprehended and accepted by your prospective clients.

For instance, you might have three standard consulting packages. The basic, the standard and the premium. This gives your prospect a choice. They can see that the basic is pretty, well, basic and that the premium is a little more than they need. It

makes it easy for them to choose the standard package.

There are no set rules as to how services can be packaged but you can consider some of the following:

- How do your competitors package their services?
- Are your prospects confused? – can you make things clearer?
- Can you add value to a package and raise the price?
- Can you create an introductory package that makes it easier to start?
- Can you tie in guarantees to packages to make them more desirable?
- Can you use the packages you create as the foundation of a more detailed proposal?

A great example of well packaged services are from a client, Steven Walker of New Business Clinic, Inc. in Calgary, Alberta. Steven provides full business start-up packages for a wide range of businesses. They include packages for buying a business, starting a new business or a home-based business, starting an independent contractor business, and investing in a franchise business.

Each package for each business category is somewhat different and outlines the exact range of services offered with pages on deliverables, benefits, case studies and information on fees. When reading Steven's materials you understand exactly what you get.

List of clients

This is very simple. Create a page with a heading that says something like: Below is a list of current and past clients divided into various industries. We have provided a complete range of services for these clients, from ABC to XYZ.

Then simply show a list of those clients you've worked with.

Case studies

Case Studies can be the very heart of your marketing materials. They are so powerful because they speak of real results. There's nothing abstract or conceptual here. Tell your reader where you started and what you achieved. Some guidelines for case studies:

- Do one case study per page – it makes it easier to read.
- Use headings for the parts of a case study such as the classic PSR – Problem, Solution, Results.
- Tell the case study like a story. Beginning, middle and end.
- Don't exaggerate your story or include superfluous information.
- Make sure to include solid bottom-line results.

Testimonials

Testimonials are funny. Some people love 'em and some people hate 'em. But you need to include them because they do add credibility to your materials. Remember, not everyone reads everything in a brochure, but if you leave it out some people will

miss it. Everybody judges your materials on their criteria, not yours, so if you don't like to read testimonials yourself, that doesn't mean you should leave them out. Here's some things to consider:

- **There are several ways to get testimonials**
  - Just ask. Ask that they write down their comments and send them to you.
  - Prepare comments based on what you think they'd say and run it by them for approval and editing.
  - Get someone to call your clients and interview them and write down the comments and then run it by them for their approval and editing.
- In no case should you ever make up a testimonial – ever!
- The best testimonials talk about bottom-line results.
- Testimonials that talk about how it was like to work with you are good as well.
- Vague and noncommittal testimonials are worse than none at all.

If you can get testimonials written on the client's letterhead, so much the better. Alan Weiss collects testimonial letters and binds them into a booklet that's almost an inch thick which he gives to prospective clients. Very impressive!

Background information on you

This is one many people have trouble with. We have a hard enough time talking about our services, but a terrible time talking about ourselves. You have to get over this and write your biography as if you were talking about someone else. The key thing about background or biographical sketches is that they should stand up to the "So What?" rule. That is, is there anything in the sketch that people could respond with a "So What?" to? You'll get that if your information doesn't tell the reader how your background actually relates to the benefits they'll receive from working with you. Here's some guidelines

- Be specific in your accomplishments, not vague.
- Talk about bottom-line results with companies you've worked with.
- Tell about awards, books, articles and media appearances.
- Tell about your education and degrees and honors.
- Tell about things in your personal life but only if it is impressive.

Avoid making your biographical information dry and flat. Add life with a touch of humor perhaps, or anything that gives your readers a taste of who you really are. I really like the bio that my client Jon Seidel did for his web site. Take look at it here: http://www.edpci.com/about.html.

Call to action

The purpose of this section is to inform people about how you work and make them feel comfortable about taking the first step. No one likes to step into the unknown, so make your business feel familiar and friendly. Some things to

include:

- Best way to reach you (phone, email etc.)
- Best times to reach you
- What you'll discuss on the phone
- What happens in an initial meeting
- What you need to know about them before you work with them
- First service you usually start with
- A little about your proposal process
- How you are paid for your services

If the first step in working with you is to buy a particular service, make a specific offer in your materials. "The first step in working with me as a coach is a two-hour orientation session in which we discuss your current situation and goals. This session is usually $250. For those responding by November 27th, however, the fee will be $175 and will include our free workbook on planning your life. Please feel free to call about details."

Articles and supplementary material

If you have several articles (published or not) that build a case for your services, include copies of them with your materials. **These add a lot of credibility to you and your services.** Include the articles that are most pertinent to your prospect's situation. Don't include too many however, or you'll overwhelm them with information. If you've appeared on radio, television or in publications, list these appearances on a separate page

Making Your Materials Persuasive

Above, I've outlined what information should be included in your materials. Here are a few more ideas to consider when preparing persuasive materials.

- Always think of who will be reading your materials and what they will be looking for.
- Always "build a strong case" for your services.
- Be as conversational as possible. Pretend you are speaking one-to-one with a prospective client.
- Your prose should be crisp and lively, not dull and ponderous. Use the active, not passive voice.
- You might want to start with a list of questions a prospective client might have about your services. Answer all those questions in the different sections of your materials.
- Don't get lost in "process end" of your business. If you get too technical or too detailed, you'll end up confusing people.

- Use metaphors, stories or examples to illustrate points.
- Stick to the core idea. If you go off on too far a tangent, people won't understand what you are offering.
- Don't get too attached to your materials. If you get negative feedback, consider it seriously.
- On the other hand, stick by your guns if you think a section must be included. The only real test is "Response," not Opinion."

  Opinion: I think this part is too detailed.
  Response: I got confused when I read this part.

  Opinion: People will never read long materials.
  Response: Even though it was long, it held my interest.

  Opinion: It needs a different graphic element here.
  Response: That graphic element really attracted my attention.

How to Start Developing Your Materials

Writing or rewriting your materials doesn't have to be a difficult process. It's not so hard if you simply follow the outline as presented above. Remember that you are not trying to be perfect here. You're trying to get something down that more or less represents how you can help your clients and how you go about doing that.

This is not fine literature! Keep it simple. Keep it direct. Remember the reader at all times and make sure you are letting them know what they will get from working with you. Here are a few other guidelines:

- Start with an outline on your word processor.
- Don't worry about where you start. Start anywhere, but start.
- Realize that this is going to take several drafts but that you only have to worry about the first draft for now.
- Write fast, not ploddingly, trying to wordsmith every sentence.
- If writing gets hard, try dictating sections into a tape recorder.
- Write too much material instead of too little. You can always pare it down later.
- Don't show it to anyone until you have done at least three drafts .
- First show it to someone who will be kind, not brutal.
- Next show it to someone who will be brutal, not kind.
- Then take that feedback and do more rewriting and editing.

For more ideas on writing copy for your marketing materials, look at Chapter 15 on Writing Motivational Copy.

Action Plan

1. Outline the various sections of your marketing materials and briefly outline the content for each section.
2. Write one section at a time. Don't worry about getting it perfect. Get down a first draft and then go on to another section.
3. Review each section. Add, edit and fine tune.
4. Run your materials past someone for feedback.
5. Do a final edit and your materials are ready for prime time!

Production of Marketing Materials

There are infinite ways to produce your marketing materials. You can do them in any number of different formats. What you need to consider is how the materials will be used. Some formats are effective for one business but not so effective for another. Here are some of the different formats and the pros and cons of each.

Presentation folder

This is one of the most flexible and adaptable formats and works very well in business-to-business situations. This is laser printing your materials onto your letterhead and second sheets and inserting them into a presentation folder. The presentation folder may be preprinted or blank.

Pros

- Very flexible format
- Cost-effective – you only need to do a few at a time
- Can look quite professional but does not look slick
- Easy to edit and update at a moment's notice
- Can add other materials such as reprints and articles to the folder

Cons

- Cost is high per each piece
- Does not look slick (especially compared to larger companies)
- The pages can get disorganized and out of sequence
- Costs a lot to mail

Booklet brochure

This is very much the same material but bound in a booklet-type format.

Pros

- All the advantages of the presentation folder
- Material is more organized and everything stays together

Cons

- The binding is more expensive
- Binding can be inconvenient unless you have your own equipment, which is expensive.

High-end printed brochure

This had better not be your first brochure! It may have all the information contained in the other formats but includes pictures, color printing and fancy graphics.

Pros

- More impressive looking – more high-end feeling
- No need for assembly – it's all there

Cons

- Very expensive
- Can't be edited or updated until the next printing
- May look too slick for your target market
- Graphics may get in the way of the message

Tri-fold Brochure

For most business-to-business services this is not an appropriate format but it sometimes can work.

Pros

- Inexpensive per brochure
- Easy and inexpensive to mail
- Good for a specific service – not the whole business
- Better for business-to-individual services

Cons

- Does not look substantial
- Cannot contain all the information on your business
- Can be expensive to design well – do it yourself formats are usually bad

Web site

A web site, for most professional service businesses is simply a detailed electronic brochure. When you've developed your materials in written form, you can simply put all this material on your web site. The only difference is the interactivity and the formatting of the information. We'll explore web sites in the next chapter.

Formatting and Design

We'll assume for the moment that you are going to use a presentation folder or booklet type brochure – at least to start. When doing this there are

a few formatting guidelines that will make your materials more attractive and easy to read:

- Don't use sentences and paragraphs that are too long. Try to limit paragraphs to about five to seven lines.
- Use sub-headings frequently in your materials to break up the text.
- Indent and use bullet-pointed sentences.
- Don't use a long list of bullet points with just one or two words – this does not communicate.
- Use more than one font. Two is usually perfect. One for the headings and one for the body copy.
- Don't use fancy headings or graphics unless you really know what you're doing.
- Experiment with two or three column formats and see if they read better than a single column format.
- Use bold and italic throughout the materials to emphasize points. But don't overdo it.
- Use a laser printer, if at all possible. Ink jets can be OK if they are very high resolution.
- If you have a color ink jet with good resolution you may want to add color to headings or graphics. But again, don't overdo it.
- Clip art from CDs can add something, but it can also look very amateurish if you don't have a good eye.

Using a graphic designer

When creating a presentation brochure there are not a lot of design decisions to be made – the fonts you'll use, margins and spacing, etc. But it always amazes me what different people can produce on a word processor. One looks elegant and professional and the other looks like it was done by a 3rd grader (and this might be insulting 3rd graders).

If you simply don't have the eye and the design skills, hire a designer to help you. But keep it simple. Have them design it on the word processor you usually use, with fonts you already have. Then you can take it over from there and make updates and changes while keeping the format intact. If they do it on a high-end page layout program, you may never be able to edit it without spending money with the designer every time. And since you're going to want to make changes, sacrifice "perfect design" for "attractive, functional design."

If you want to do a fancier brochure, don't attempt a do-it-yourself job or your materials are likely to look very second rate. In this case, always use the services of a designer. It will be worth every penny you pay.

Before you hire a designer, see samples of their work. And try to find someone who has experience working with small businesses. You'll spend too much money and get more than you need if you work with someone who specializes in high-end corporate design.

Using a writer or editor

Writing your own materials is a good idea because it helps you think through your services and makes you struggle to express what you really do and how you can help your clients. However, some people find this process a lot easier than others.

If the task is too daunting, get help. Work on the outline yourself and then get a writer or copy editor to make it all flow together. Show them this material to help them understand what you're trying to accomplish.

Proofing for typos and grammar is important as well. Typos are the bane of a writer's existence. Someone's reading your wonderful copy that you've slaved over for long hours and they come upon a typo or an instance of poor grammar and it stops them in their tracks. They wonder, "If they are so good, how come they can't get a simple thing like this right?" It leaves a bad impression. And no matter how many times you go over your materials, you're still likely to have some mistakes. Believe me, I know. I proofed this manual three times and still kept finding typos here and there! It's well worth the investment to have a proofreader/editor go over your materials and polish them up before you show them to the world. One good way to catch typos is to read the material aloud. You'll not only catch mistakes but notice places where the copy doesn't flow smoothly or the meaning is not as clear as it could be.

Here's a tip I got from InfoGuru Linda Iloba:

> If the text is huge like several chapters, think about your buddies. Have an informal get together over the weekend and let them choose which chapters they will help you edit. That way they are interested in what they read and will give it their best effort. Besides, over good food, a lot of other ideas may come up you had not thought of including what could be the subject of another chapter or book. Find time to personally exchange ideas on corrections made to eliminate misunderstandings. Otherwise fax it over to them and discuss corrections over the phone page-by-page. It makes them feel you really value their judgment and they will be more willing to assist the next time around.

Action Plan – Packaging Your Services

1. **Start working on or improving your marketing materials.** I suggest you start with your **Executive Summary.** If you can develop solid information in the five sections outlined, you're half way there.

2. Then start working on the other sections, one section at a time. Start with the easiest and work your way towards the most challenging. This doesn't have to be a completely linear process.

Relax. This will take some time, but it shouldn't take forever. Your marketing materials must be a priority because they form the foundation of your whole promotional strategy.

Books on Marketing Materials

Cash Copy – Jeffrey Lant

Independent consultants Brochure and Letter Handbook – Herman Holtz

The Elements of Style – Strunk and White

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 7

Creating Magnetic Web Sites

The Purpose of a Web Site

A web site is one of the most unique and powerful marketing tools ever invented. It can work like a brochure, like direct mail or even like advertising. It can be customized instantly, and it can be seen by thousands of people for a minimal investment.

We need to watch that we don't get seduced by the power of the web and overestimate what it can do for our businesses. Just as importantly, we need to realize what it can do and harness that marketing energy in the most advantageous way possible. I think my site is a good example of this.

My web site started out with a conversation with a colleague in 1996. I not only wanted to develop my own web site, but to start developing them for clients. I felt that this would be a very important medium for professional service businesses. He encouraged me to learn HTML and I bought a book called "Teach Yourself Web Publishing with HTML in a Week." The first edition of my site was up and running in about two weeks. Since that time, I've gone to a web design program instead of designing in HTML, and have now designed over 40 web sites. My own site has gone through four complete design revisions.

My web site has far exceeded my expectations as a powerful marketing tool. It's truly an InfoGuru site in that it contains lots and lots of valuable information – articles, a Marketing ScoreCard, Top Ten Lists and a free Marketing Workbook. I put a sign-up form for my eZine on the site and started to get subscribers from all over the world. When I created my tape program in 1999, I put it on the site and started selling it. I've sold several hundred copies.

Clients and others send people to the web site who then call me to work with them. People from all over the country discover the site on the web and have called me for marketing assistance. It's hard to imagine what business would be like without my web site. It creates visibility and leverage with relatively little time and hardly any money. It has helped to increase my businesses income by tens of thousands of dollars every year.

The web as a "Marketing Hub"

The web is the one thing that can connect all your InfoGuru Marketing efforts. Your objective should be to have people visit your web site just before they call to do business with you. The web site educates them, persuades them, impresses them and motivates them to take action to find out how you can help them.

What can you actually expect from a web site? Different businesses use web sites in different ways. As an InfoGuru, here's what it can accomplish if done right:

- **Increases your visibility and credibility** – Many companies want to work with InfoGurus who have web sites. It makes you look established and professional.
- **Provides instant information on and access to your services** – These days everything seems to be in a hurry. Having your materials on the web puts you into "Internet Time" and provides the answers a prospect wants now.
- **Enables people to warm up to you slowly before calling** – By visiting your site, looking at your free information and perhaps signing up for your eZine, they can get comfortable with you before they call.
- **Shortens the sales cycle** – By the time a prospect calls, they know a lot about your business already. They feel they know you and trust you.
- **Helps your existing clients refer people to you more easily** – They can recommend that their associates visit your web site first. This is a lot less threatening than giving you a call. They can check you out first.
- **Gets you non-local business** – This might not happen for awhile, but a good site can be seen by people all over the world and sooner or later, you'll start getting calls from out-of-state, sometimes internationally.
- **You can sell information products on the site** – This can be a sideline or a major business on its own. You can start with inexpensive reports and tapes and move on to eBooks and other information products.

I hope that gives you enough reasons to get a web site! It can really leverage any InfoGuru business like no other marketing tool.

But if people visit your site and it's not powerful and effective, you're going to have a lot of trouble turning those visitors into clients. This chapter is about how to make sure your site gets the job done.

Design, Content, Navigation and Promotion

1. **The first thing you notice on a site is the design.** The graphics, the colors, the layout, typeface and photographs all create an instant visceral experience. If this experience is positive, then your visitors are likely to stick around.
2. **The next is content.** Is what you are saying on your site convincing, persuasive, interesting, educational, useful and motivating? If not, your site will be boring and irrelevant and people won't have a reason to stay and dig into what you have to offer.

3. **Next, navigation needs to be simple and intuitive** so that no matter where you are in a site you can easily get to the next page. If you confuse or lose your visitors, you'll create a negative experience. And they won't return, let alone do business with you.
4. **All of the above are there to get one result – your MWR or Most Wanted Response** – the thing you want to happen when people visit your web site. This might be to sign up for your eZine or to call you on the phone, but you need to be very clear about what you want this MWR to be.
5. **Finally you need to promote your site effectively so that more people visit your site.** This one we'll cover in detail in the next chapter.

Likes and Dislikes

First, I want to give you a list of things that people like to see on web sites, and things they don't like to see. I didn't make up this list arbitrarily. It's a result of asking hundreds of participants at workshops what they wanted and didn't want when visiting a web site.

Like	Don't Like
Uniform print and easy to read text	Poorly contrasting text and backgrounds
Pleasing color scheme – visually clean	Poor color scheme – cluttered layout
Clear and intuitive navigation	Mystery navigation (icons, not words)
Un-framed pages	Use of frames
Deep information – high value	Not enough information
Contact info easy to find	Hidden or minimal contact information
Quick loading graphics	Slow loading graphics
Relevant links within site	Too many links
Minimal movement	Flash animations
No unnecessary special effects	Use of JavaScript
Pages fit the monitor screen	Horizontal scrolling
Easy to print out	Difficult to print

It's a funny thing. People know what they don't like in other people's web sites and then they go and get a web site designed that has all the elements they don't like! What's going on here? I blame it on designers who have a lot of fancy tools and who want to use them. They are artists, not marketers. When you have a site designed, you need to rein them in and make sure your site is user-friendly and communicates clearly what you can do for your clients.

Next we'll talk about other things that are necessary for a successful web site.

1. Design

Do you have a good eye? Can you tell good design when you see it? Can you draw something and have it look more or less like the object? Can you distinguish between subtle shades of color? Do you quickly notice detail? Can you tell the difference between type faces? When something is poorly designed does it literally give you "the willies?"

Finally, can you take all of these skills and then apply them to the layout of a web site using fairly tricky web development software?

Guess what? Almost no one should be designing their own web site! The learning curve is too steep for a non-designer to create a professional site. You will save lots of frustration, time and often money by getting someone else to design your site for you. Sure, I designed my site myself but it took literally hundreds of hours to master the skill, and I wanted that skill for designing other sites. Now it takes about 20 hours for me to design a site that's as good as or better than mine. As an InfoGuru, your time is better spent on other high-leverage marketing activities.

But you don't want to just turn your site over to a designer and have them take their best stab at it. You first want to do some planning and development of the web site content and then have the designer work on developing an attractive site that is also content rich.

What to look for in a web designer

Web designers ideally have a combination of three skills: 1) marketing, 2) design, 3) technical know-how. Unfortunately it's hard to find all of this in the same person. Marketing skills will get you good content and navigation, Design skills will get you an attractive site and technical skills will get it all working flawlessly.

Watch out for web designers who are primarily designers. They will give you a beautiful site but it will often have negligible marketing impact. They hate HTML text and will put up full pages of graphic text. Beautiful but slow loading. They'll put in gorgeous flash animations that wow but take minutes to load. You get the idea. Everyone will admire your site but it won't get you much business.

On the other side is the technical wizard. They don't just add in Javascript applets, they program it themselves. Who cares if it does anything useful? You'll get a site that works perfectly but looks butt ugly and confuses everyone who visits. Technical people in larger web design firms are great to have but they should have nothing to do with how your site actually looks.

The good news is that there are many web designers and design firms that tend to have a good combination of design and technical skills. Develop your materials from what you learn here and then give your designer the content they need to make a great site. Just make sure you look at their work and like the style of the web sites they've done. There's no one perfect style.

For InfoGuru sites the watchword is: Keep It Simple! Simple, clean elegant design, simple formatting of text, nicely balanced colors, navigation that works flawlessly.

Remember that people go to your site to get information on how you can help them improve their condition. Anything on your site that calls attention to you (i.e., fancy Flash animations), but that has nothing to do with how you help them, won't get you very far.

Design Ideas

Here are some design ideas to make your site more user-friendly. Run these past your web designer.

- **Make your paragraphs short – three to five lines.** If lines are any longer than that they're hard to read and your visitor will give up before they start. Also you want to make sure your lines are not too long. By providing borders on the left and right of your text block you increase readership dramatically.
- **Make the first sentence of each paragraph stand out by using bold type.** This one little secret is more powerful than you might realize. You see, when someone reads a web page the eye immediately wants to scan the content to get a big picture of what's on the page before they commit to read anything. If the page consists of all monotone text, you have a problem. They simply won't read anything on the page. And if they don't read, they'll never respond. By bolding first sentences and sometimes other key ideas on the page, your reader can quickly scan for meaning and then will usually slow down and come back and read everything on the page. This is called the "quick-scan, slow-scan" technique.
- **Use the right size type and the right typeface.** Remember that PCs and Macs display type differently – Macs Smaller – PCs larger. A good compromise is Verdana sans serif type – it works pretty well on both platforms. A lot of people use either Times or Arial on their web pages. Although common, both of these typefaces are harder to read. If you want a "serif" typeface to replace Times, I recommend Georgia. Like Verdana, it was designed to be more easily read on the screen.
- **Use color in your type to highlight ideas and provide contrast.** You want things to pop out and get attention to get people to continue reading. You don't want to overdo it here and you don't want your pages to look gaudy, but you do want to grab attention.
- **Use attention-getting headlines on each page and on subsections of the page.** Look, a headline that says, "Welcome to My Web Site" doesn't tell you anything. You want to include a benefit in your headline that gives your visitor a reason to keep reading. By using subheads that point out the content as you go, it keeps people interested and reading your information.
- **Include links to other parts of the text on your pages, but don't overdo it.** This is the great benefit of the web but it can also be a curse. If you have five links in a paragraph, people won't know where to go first and they'll get confused. So use those links economically and strategically – usually at the end of the page to keep people moving through your site.
- **Above all, make sure everything on your site lets the visitor know**

how they will benefit from your services. Everyone is thinking "What's in it for me?" and if you don't answer that question on every single page, people will lose interest fast.

- **Include graphic elements sparingly to brighten up the page or to draw the eye to a particular section.** A good picture or illustration, well placed on the page can contribute to your message. But don't just plop in graphics for the sake of doing it. Your page can quickly become cluttered and confusing.

Things not to do

All of these things tend to slow down your site and slow down those who are searching for information. Remember, the purpose of your site is to attract new clients, not to win design awards.

- **Javascript** – things like scrolling text. This is unbelievably distracting and it makes the page load much more slowly.
- **Frames** – where one side stays fixed and the rest scrolls. Frames tend to hurt the ability of search engines to find your site.
- **Flash –** entry pages that contain a design or a Flash animation. People want to get right into your content and the Flash slows them down.
- **Mystery navigation** – where there are icons, not words on the buttons. People will forget immediately what that icon stands for and will get increasingly frustrated navigating your site.
- **All graphic text** but no html text that can be indexed in search engines. You've seen sites like this. They are perfect and appear the same in all browsers, but they defeat the whole purpose of a web page. They also load slowly.

Web site examples

Perhaps the best way to start on the design of your site is to search the web until you find some sites you like. Then show those to your web designer. Do a search on whatever your area of expertise is so that you come up with similar sites to yours. If you'd like to see some of the sites I've designed, go to www.actionplan.com/webdesign.html and link to the over 40 sites listed.

Check out this site for a more in-depth briefing on this topic: www.WebPagesThatSuck.com. Yes, you heard it right. One of the most useful sites on the web to help you understand what works and what doesn't work with web design.

2. Content – Web Site Outline

What we're going to do next is work on a web site map. This is like the blueprint of your site that will help you both develop your materials and the navigation of the site. We will be using the Web Site Outline below. This shows the content outline for a typical small service business site with 11 main pages. Your site may have more or less pages and your headings may be different, but this can be adapted to the needs of your business. Let's go over these pages one at a time.

"Home/Overview "

This is what your visitors will see when they first go to your web site. You need to have information on this page that will immediately generate attention and interest and motivate them to explore the rest of your site.

You have a few options here:

- High graphic content and low information content
- Low graphic content and high information content
- Medium graphic content and medium information content

I am more in favor of two or three, never number one.

If you are too heavy on the graphics side, it attracts the visitor's eye but distracts them from the message you are trying to get across. Pages that have lots of fancy navigation buttons and a cryptic phrase or two are not good home pages, in my opinion.

The "Core Marketing Message" needs to be in the first sentence or the first paragraph of your web site. They need to know what your business is about and what's in it for them in just a few seconds or you will lose their interest.

Your writing needs to be brisk, to-the-point and benefit-oriented right out of the gate.

Other ways to attract immediate attention:

- Ask client-centered questions that reveal the problems you solve.
- Use a client quote that explains precisely how you helped them.
- Use a quick and simple benefit-oriented story that makes your services clear.

You don't want to put too much information on your Home Page but then again, you don't want to put too little. You want just enough content that makes it easy to read, easy to digest, easy to understand and easy to know what to do next.

Here's a possible outline for a Home Page

1. **Start with Headline – Either Problem or Solution-Oriented**

   "Wood Product Manufacturers – Are Your Profits Falling?"

2. **Always open with who you work with. This is what they want to know first.**

   "Arcadian Strategies works primarily with wood product manufacturers in the Northwest."

3. **Then follow quickly with a problem, challenge, issue or predicament.**

   "If you're like most wood product manufacturers, you're facing increasing competitive pressures from imported products and profitability is slipping."

4. **Next, point towards a solution.**

   "State-of-the-art manufacturing processes, distribution channels and marketing strategies are helping many wood products manufacturers compete successfully with foreign competitors, while dramatically increasing profitability."

5. **Now, tell them what they need to do:**

   "Making the transition to profitable business practices is a four-step process:

   1) Assess and measure all current practices in-depth

   2) Determine your biggest money and productivity wasters

   3) Develop a transition plan from waste to profitability

   4) Implement the highest-leverage new practices

   "Wood products manufacturers who are implementing this approach are seeing profitability increases from 13% to 29%."

6. **Prove that you're credible and successful:**

   "Arcadian Strategies has been working with wood products manufacturers since 1987 to increase profitability and performance. We've worked with over 50 of the largest U.S. wood products manufacturers. We have a solid record of success that proves our approach works. It can work for you as well."

7. **Finally, provide a call-to-action:**

   "Please browse this web site for detailed information on how your wood manufacturing company can become more profitable. And make sure you get our free report, 'Profitability Secrets for Wood Manufacturers.' "

If you cover these points concisely and clearly, your site visitors will know immediately if your service is for them or not. It will give them enough information to know whether to visit the rest of the site or to go somewhere else. Don't lose your visitors with sketchy, incomplete or even confusing messages on your home page.

You also need to direct visitors to where to go next on your site. Usually your site will have navigation buttons across the top or to the left on your page that list all your main pages, but it doesn't hurt to suggest to your visitor that they go to a particular place next. For instance, you might want to direct them to the page that helps them understand if they need your services or not. And then at the bottom of that page you will direct them to the next page and so on.

"Learn about the Wood Products Manufacturers we work with and the issues they face by clicking here."

"Who We Work With"

This page is for those who think they may need your services but are not sure. They want to know if their situation fits with what you offer and on this page you help them find out. There are many ways to do this.

First outline the kind of companies you work with in an opening paragraph. Give basic demographics and psychographics.

"We work with a wide-variety of management consulting firms. These firms provide business-to-business professional services to domestic and sometimes global businesses. They may provide consulting to manufacturing firms on Strategic Supply Chain Management; help Fortune 500 firms execute Strategic Plans; identify and enhance competencies in management professionals to ensure continued

professional development; or help domestic and multinational corporations develop and implement IT technologies and strategy."

Then include a list of problem scenarios. List each problem, challenge, issue or predicament and then a few sentences to clarify it even more. You might have four to six problem scenarios listed.

Are some of these statements true for you?

"My partner and I have just started a consulting business. How do we get our first clients? We have been able to get our previous employers as clients, but we need more to sustain the business and grow."

"I've been in business for several years and I've always relied on word of mouth to bring me business. But now things have changed in our industry and word of mouth has slowed to a trickle. How do we start getting the word out about our services?"

Next, answer this question, "Clients are likely to be successful working with us if..." and then list the criteria you want your ideal client to meet. Again, you might have about four to six criteria listed.

"You do 'what it takes' to deliver quality professional services for your client. The professional services delivered are, without exception – your best effort. Striving for excellence and continuous improvement are built into your corporate culture and mission."

"You adhere to the highest standards of honesty and integrity. If you want to succeed by taking ethical shortcuts, we're not for you. If you want to play the business game at the highest level, we'd like to help you succeed."

This page is extremely important. It's about your clients, not about you. It helps them understand if your services can help them or not. And it also lets them know you don't work with everyone. It actually raises the bar and eliminates prospects that are not appropriate clients for your business.

"How We Work"

In the previous page you've talked about your clients, now it's time to talk about you. There are endless things you could include on this page. What you are trying to get across is a sense of who you are and what it might be like working with you and the results you produce. Here are a few possible areas.

Expected Results

If they work with you, what kind of results can they expect? Do not waffle here. Tell them what's going to happen if they commit to working with you. Don't sugarcoat it. Don't exaggerate it and don't undersell it either. People buy your services because somewhere deep down they trust you will make things better for them. In this section give them reasons to believe they've made the right choice to call you.

Remember, you don't want just a list of five or six bullet points. That doesn't communicate. Write to them as if they were sitting across the table from you. Build a

solid case for your services. You don't need marketing hyperbole, just solid facts to show that you're the right firm for their kind of project.

> **"When you work with us you can expect to see desirable and sustainable changes** in your teams' performance and productivity. Team members will participate more actively, conflict will be reduced significantly and results will come with a lot less struggle and effort."

One good way to approach this is to look at the problem scenarios from the previous page. The expected results should mirror the problems you outlined. If the problem was that they couldn't keep good employees, the result is that if they work with you, they'll retain the best employees.

Guiding Beliefs or Values

Let your prospect know what you base your work on. What is your philosophy? What are you really trying to accomplish? What are your values? This gives clients insight into what you stand for. If you share similar values there's going to be a connection, a resonance.

Outline this section very simply. List one item and then add a few sentences of explanatory text. For instance:

> **"Profitability is Not Optional** – You run your business for many reasons and one very important one is to make a profit. Profit is not optional. We work very closely with clients to do everything possible to increase their overall profitability."

> **"Companies can and should be great places to work.** Sure you're in business to make a profit, but if your employees dread coming to work every day because of the way the business is managed, you're going to have serious productivity problems. A workplace can be a fulfilling and satisfying experience."

Our Approach

This is what it's like to work with you. When you work with clients, what is your approach to projects? What do you try to accomplish in every job? What are the things you make sure to do every time? Is it fun to work with you? Invigorating, challenging? Tell them.

> **"We're above all, flexible.** Different clients need different things. One size does not fit all. Although we have a variety of service modules (see services page) that address a wide variety of issues, we approach each project with the same attitude: We design the project to produce sustainable results for your company with the least amount of struggle."

> **"Quick Response is Guaranteed** – Nothing is more frustrating working with a consultant who will not answer their phone calls or return their emails. We don't just try to be responsive, we guarantee your calls or emails will be returned in 4 hours or less."

Your Uniqueness

What makes you and/or your services unique? Is it the model or methodologies you use? Is it your track record of exceptional results? Is it something that nobody

else is doing? Can you contrast what you do with others in your field? You need to clearly answer the question: "Why should we give you our business?"

"When you're looking for a coach these days there are a lot to choose from. What makes me different than any other performance coach? I think the difference lies in the fact of my twenty years experience as a successful entrepreneur and business person. I don't work with theory but with hands-on approaches that are proven to work."

"Services"

This is an overview of all the services you offer. What you do, how you do them and what your clients get out of them. You might expand this to several additional pages if you have several services.

Each service should have a title and under each title you need to explain clearly both the benefits of what you offer and exactly what deliverables they can expect from your service.

For instance, if you have four main services, let's say **"Training Programs. Mentoring/ Coaching Programs, Executive Coach and Consulting."**

On the main services page list all of those services and underneath a concise paragraph describing that service:

> **Training Programs**
>
> ABC offers a full range of sales training programs that can be customized to our client's needs. Our focus in all of these programs is to measurably improve the selling skills of each of the participants. In fact, we guarantee it. Whether you have junior sales people or a seasoned staff of pros, we have a program that will take their selling to the next level. Go here for complete details.

Then that will link to another page with even more details about the program. The basic outline of each service should go something like this:

> **Name of Service** – Every service needs to have a name; it makes it real, it makes it memorable.
>
> **Purpose of Service** – This is the big objective that this service is designed to accomplish
>
> **Intended Results** – This is all the various results and benefits a client can expect to receive as a result of using this service.
>
> **Structure** – This is actually what happens in the course of this service being delivered. This is the process, the features, the "what happens."
>
> **Call to Action** – This is a statement that encourages the prospect to call to find out more.

Give your prospects every bit of information they need to know to make an informed decision. Make sure to make your service descriptions interesting, even compelling. This is what you're selling after all. You can't bore somebody into buying your services.

"Client List"

Here you simply want to list the clients you've worked with. You may have a simple list or you could even list each client's name and let them know briefly what you did for them: "Hewlett Packard – team building and facilitation." In some cases (like mine) my client list consists of very small companies that not many people have heard of. In that case you might want to list the kinds of companies you've worked with: Consultants, Coaches, Trainers, etc.

Often I recommend giving a brief demographic and psychographic breakdown of who your clients are. Let them know that you: "work with sales teams in the hi-tech industry who are facing tough competition and who need to go beyond the basic sales skills to get ahead." By clearly identifying your clients the response is "This firm works with companies just like us." If you are very generic in your targeting, then it will be hard to tell if you have any specific expertise or not.

"Stories and Case Studies"

These are case studies or vignettes of various clients you've worked with. These stories tell the situation before they started working with you, what you did and what the results were. Case studies are very persuasive to most people. Your potential clients will put themselves in the place of the clients you've worked with and will see themselves receiving the same benefits.

Case studies should occupy a central place in your site because they make a very persuasive case for your services.

A good format for a Case Study is the following.

Problem/Situation: What was going on before we started working with the client. Challenges the client needed to address

Solution: What We did for the client

Results: What came out of the work we did together.

Here's an example:

A $350 million foodservice frozen foods manufacturer had established distribution relationships with two large redistributors. In the span of 3 years, a significant percentage of volume was being handled by the redistributors, including a surprising number of customers who had switched from direct distribution to buying through the redistributors. As redistributors began to demand higher allowances and additional services, the entire program was called into question, and it became clear that the costs and benefits of working with redistributors were not well understood.

Franklin Foodservice Solutions conducted an extensive study of the issue, including:

- comparative costs of redistribution vs. direct distribution
- price list structure and its impact on customer behavior
- sales force, customer, and broker attitudes toward redistribution
- interviews with redistributor executives
- outlook for redistribution

The result was a comprehensive redistributor strategy, which took into account the role of redistributors, appropriate allowance levels, and the proper degree of information sharing between the manufacturer and redistributors. The client is now comfortable with the structure of the program and has improved relationships with redistributors. The new strategy and relationship has led to joint cost reduction and business-building initiatives.

"Testimonials"

This page is a list of quotes from satisfied clients telling how you successfully met their needs. Good testimonials speak about results as well as what it was like to work with you. You may put your testimonials on a separate page, accompanying your stories or underneath your client list. I have also put testimonials on every page of the site (usually in the left hand margin) so visitors will see a testimonial on every page of the site. Another way is to intersperse testimonials between paragraphs on other pages. This way they jump out and you can't miss them.

Some people add a testimonial at the bottom of a case study and others include one with the service it refers to. Be flexible. First get good testimonials and be creative about where you put them for the most impact.

Don't assume that if you yourself don't read or believe in testimonials that other people don't read or believe in them. They do! They are very persuasive, especially if they are results-oriented. A testimonial like this is worth its weight in diamonds.

> "Working with you was a turning point in my business. Not only did you show me how to resolve most of my profitability problems, you pointed the ways to many new sources of revenue. Last year our volume doubled and our profits tripled. And it was all because of you!" – Ecstatically Satisfied Client

You can see that this is much more powerful than:

> "It was very nice working with you and you gave us numerous ideas that will help our business in the coming years." – Happy Client

To get a good testimonial like this you often have to pull it out of the client. Get someone to interview the client or even write it yourself and then get them to approve it.

"Articles"

Here's where you can post all those articles you've written that show how knowledgeable you are about your service. This is the key InfoGuru strategy on your site. It's where you start to give away valuable information. You may have several individual pages for articles and you can archive many articles as well. Articles are one of the best ways to get visitors to return to your site. If you add articles on a regular basis, there will always be a reason to return. Archived articles make your visitors think of your site as a valuable resource. Remember, the more people that visit your site, the more word-of-mouth and the more likely a qualified client will give you a call.

"About Us"

This page contains background information on you and your company. This is to help build credibility and a "face" for your company. In fact there's nothing wrong with putting your picture on this page as well. Include information on you and your company that helps the visitor better understand how you can help them solve their problems or accomplish their objectives.

Go to the many web sites we've done for our clients and read their bio pages; www.actionplan.com/webdesign.html.

"Resources and Links"

This is a page or pages with valuable information or links to other sites. This gives visitors a reason to return to your web site. You might have links to all the professional associations in the area or links to related, but not competing, services. You may have a bookstore or any other resource that your visitors might find useful. I believe it's important to list resources that have something to do with your business (as opposed to links to all the bowling allies in the US, just because you like bowling.)

"Contact Us"

Here is where you tell your visitors how to contact you and how you start working with clients. You'd think this might be obvious, but it isn't. It can be scary calling a professional service. The more they know about you and how you work, the more comfortable they will be about calling. This is why it's a good reason to tell all your referral sources to direct their referrals to your site before they call you.

The Contact Us page is also the best place for a response form. I have mixed feelings about response forms. The way I prefer to hear from clients is with a telephone call, not an email. I feel that someone who picks up the phone is usually more motivated to do business with you than someone who fills out a form. But in some cases, especially if you need to get a lot of information from a prospective client first, a response form can be a good idea. See how I've used them on my web development page.

If you see clients in your office, this is a good place to put directions, a map or a link to the Mapquest site.

"eZine Sign Up"

eZines or email newsletters tie in very directly to your web site. An eZine is sent out anywhere from quarterly to weekly. Once someone has visited your site and they like what they see, don't lose contact with them. Encourage them to sign up for your eZine.

I suggest creating a page that has your latest eZine posted and then a simple sign-up form on that page that asks for their name, email address, etc. You can also send people to your site if they want to sign-up for your eZine. And conversely you also send people to your site **from** your eZine to inform them of new services, etc.

I believe that, for InfoGurus, the combination of a good web site and a good eZine are unbeatable. For some, this combination is the primary way they market their services.

When I speak with clients who are resisting the idea of doing an eZine, I put it to them this way:

> "Think of your web site as your car or vehicle. It can take you where you want to go with your marketing. Then think of the eZine as the gas for that vehicle. Without gas, the vehicle may look beautiful but it simply won't go very far."

Imagine the power of having hundreds, or even thousands of subscribers to your eZine. Then your marketing will not only never run out of gas, it will be supercharged with high-octane jet fuel.

Want an excellent resource for developing a great eZine? Check it out here.

Updating your site

Finally it is important, if you're going to have a web site that really helps your business, to update it regularly. Put new information on the Home Page. Add articles, add pages, re-do the design, add more navigation or links. Make sure current information is really current. There's nothing worse than a site that looks and feels out-of-date. It's like a storefront with a peeling paint job and letters falling off the sign.

It's pretty easy to update a site yourself using web creation software. Once your site is designed, you download it to your hard drive and learn the basics of opening a file, making changes and uploading the file to the web. My preferred software is HomePage by FileMaker corporation. It's cheap and easy to use. (Sadly, this software was recently discontinued. I'd buy a used copy of this over anything else on the market, however!) FrontPage is also an option, although it has so many bells and whistles it can confuse you. DreamWeaver is also good and works on both platforms. Shop around for the one that's right for you.

I highly recommend doing your own site updates (with some reservations). It can be just too much hassle sending changes to your web designer every time you want a change. It can take a lot of time and money. On the other hand, some people seem to have a knack for wrecking their site as soon as they start making changes! You can take a very attractive site and ruin it if you don't know what you're doing. If that's the case, it's false economy to do your own updates. There are more and more web designers who will happily do updates to your site for a reasonable fee.

3. Navigation and Links

One of the biggest differences between a web site and a brochure is the ability to quickly jump from one page to another and to link from any word, phrase, or graphic to any place on the web site or outside the site.

You can literally place links anywhere on the site that will take you to anywhere in the web universe. But you don't want to get carried away with links. You want to make your navigation both simple and intuitive. Here are some guidelines:

Make sure you have navigation controls on each and every page – usually in the same place and often more than once on a page. These days, it's pretty common

to have the main navigation buttons at the top of the page or on the left side and then have text navigation links at the bottom of the page. This way, no matter where you are, it's easy to move to the next page.

Put the order of your buttons in the most logical sequence. Put the most important ones at the top or to the left, the least important, or the ones you want them to visit last, at the bottom of the list or to the right.

I've done a lot of experiments with navigation buttons on my web site and learned some very valuable lessons. I've done navigation bars with many buttons, and bars with only a few buttons and a lot of sub-buttons. But when it came right down to it, I asked myself – where do I want my web visitors to go first? Ultimately I decided to give them a choice. The first was that I wanted to send them to my eZine sign-up page so that I could continue to market to them. Then I wanted them to visit the page about my Client Magnet Tape program. I tried many formats, names, and designs for my navigation but I found that if I labeled my Sign-up Page "Free Stuff" I got the most click-throughs. And for the Tape Program, my best results came with "Marketing Tools" as the button.

I figured that if people went to those sections and were interested, they'd probably check out other areas of my site. I find my other free sections get a lot of visitors – such as my Articles Archive and 5 Ps of Marketing. But I also get a lot of visitors to my Consulting and Coaching pages and that results in calls from new clients from all over the country.

Make your navigation buttons attractive but simple. Navigation buttons are frequently graphic images. That's fine, but they shouldn't take two minutes each to download.

When adding links to text, be conservative. A paragraph with five links to other pages in the site will only confuse people with too many choices. A good place for text links is at the end of the section where people can click to a page that has more details, or at the bottom of a page to tell you where to go next.

4. Most Wanted Response

I've touched on this above when I discussed how I experimented with navigation buttons. I knew where I wanted my site visitors to go so I tried everything possible to get them to go there.

The eZine sign up has been very successful, as up to 1/3 of my site visitors sign up for my eZine. The Navigation Button "Free Stuff" really works. The first thing they encounter is a small sign-up form and then a sample of my eZine. I encourage them to sign up and get more valuable information. Then I added a second button to my home page that says:

> **This site is full of useful information to help you create a great marketing plan and attract new clients consistently.** You might want to start by downloading our free Marketing Plan Workbook.

When they click on that link they get the same eZine sign-up form and a message that lets them know that once they sign up, they'll get the free Marketing Workbook. When I put that up, my subscriptions more than doubled overnight!

The principle I advocate is: "offer 'free bait' if you want your visitors to do something or go somewhere."

Now once they get onto an information page or a page selling a service or an information product you need to be very clear what you want them to do. Ultimately you want an order or a call. In Chapter 15 on Motivational Copy, I go into a lot more detail on how to do this, but the formula is pretty simple:

You want to do 4 things:

1. Make it **personalized**. Talk directly, in a conversational tone to the person reading. Use the word YOU throughout.
2. Make it address **the needs and concerns** and frustrations of your readers so they can relate your message to their situation.
3. Offer **hope** that you can address those concerns and frustrations successfully by offering benefits and advantages.
4. Tell them what they **need to do** to get those benefits.

If you look closely at the text of most web sites, they do none of the above. They just tell, in a few terse paragraphs, what they do. No personalization, no discussion of a problem, no talk of a solution to a problem and no call-to-action. The text just sits there doing nothing. It doesn't attract, interest, motivate or arouse curiosity or desire.

When you start asking what "Most Wanted Response" you want, you may start to realize that you need to **do something** to get that response. You have to actively engage the reader and get them thinking about how your service might address the problems they are experiencing. And the better you do that, the more people will pick up their phones and give you a call.

Web page counters

You may be wondering how I know how many people are going to what page of my site. I've found a very good and affordable statistics package that works on all platforms from a web-based interface. It's called WebStat and it gives a wide variety of useful information about what pages are visited, where the visitors come from, etc. This is really useful in learning what pages get visited and which ones get ignored. You can then alter your navigation to get people to go where you want.

You can also use a simple counter on each page (by the way you can make it small and put it way down on the page so most people don't notice it), and track what pages get visited the most often. Try www.digits.com. It works and it's free.

Action Plan – Creating Magnetic Web Sites

Doing a Web Site is not a small undertaking but here's how I suggest you start.

1. Create a plan or a web map for what will go on your site. You can use a large part of the content that you developed for your marketing materials.
2. Next, you need to decide how and when to invest in designing this all-important marketing tool. You can do it yourself or you can get help. I suggest the latter. If you already have a web site, look at what you can do to improve it, based on the above guidelines.
3. Seriously work on your navigation and Most Wanted Response to organize the flow and content of your site. This is key to web site success.
4. Learn the basics of a web design tool such as HomePage or FrontPage to update your site.

Best Book on the Web and Web Marketing

The best overall book on web site design and marketing is Make Your Site Sell by Ken Evoy. Click on the link to go to the site and learn about it. It's very affordable, and if you are going to develop a web site or improve on the one you have, this is a must-buy.

Chapter 8

Web Site Promotion

Integrated Web Marketing Strategy

Your web site ties all of your marketing together. It includes how you promote your site both on- and off-line, how you tie in your eZine and how you use the best keywords into your site. When everything is integrated like this, you have a very powerful "InfoGuru Marketing Machine."

Promoting your InfoGuru site successfully requires the application of many strategies used in combination, but we'll focus on the five main strategies for InfoGurus that work the best:

1. **Off-line Promotion**
2. **Email Promotion**
3. **Search Engine Promotion**
4. **Keywords** (Getting Found on Search Engines)
5. **Electronic Networking**

1. Off-line Web Site Promotion

Before you do any actual promotion, make sure your web site address – URL – is printed on every single piece of material you already use such as business cards, letterhead, flyers, brochures, talk handouts, etc., When you meet someone at a networking event, you might suggest they go to the site for your online free report as you hand them your business card.

Off-line promotion is really the strategy you need to master first because most people who visit your web site ought to be people you've met or people who have been referred to your site. It will take some time to get listed in the search engines and get calls from people who only discovered you on the web. So don't wait around for the phone to ring, drive people to your site by using the strategies outlined below.

Using your mailing list to promote your site

You've just launched a new site and you not only don't have any visitors, you don't have any email subscribers. But luckily you do have a database of names and addresses of clients and prospects. You do, don't you? If not, do not pass go, do not collect $200, get working at building that database. You can start to leverage that list of contacts to get some visitors to your site and added to your eZine list.

Here's how:

1. Collect all of those names so that you can do a mailing. Yes, a real, live snail mailing through the good ol' US mail.
2. However you mail your letter, the key is the content. These days web sites are getting to be old hat. So if you just send a letter saying how proud you are of your web site and won't they please visit, you're likely to get your mother and great uncle Al taking a look, but that's about all. No, you need to entice them to check you out.

Since you're an InfoGuru now, it's not a problem, right? You simply say something like this:

> "I recently launched my new web site and on the site I've posted a special report just for you. It covers the ten best kept secrets of increasing the effectiveness of... whatever... This report will be up on the site for you to download for just one week. Not only that, I've put your name in a drawing and, in addition to the

report, three lucky people will be winning a copy of the new book... book name... that everyone is talking about."

Get the idea? They now have two pretty compelling reasons to visit the site. When they get there, they download the report, look to see if they've won the book, and then you lead them, ever-so-gently, to sign up for your eZine.

"If you enjoy this report, I know you'll also enjoy receiving updates in the area of... whatever... to help your business succeed. Simply fill out the form below and you'll be getting my eZine on a monthly basis."

Now they have not only looked at the site, they've signed up for the opportunity for you to market to them forever.

Pretty cool, don't you think?

Using talks to promote your site

I've found the best offline way to promote my site is at the talks I give. And I don't just print my web address on my handouts. I take a more proactive approach. After all, what's the chance they'll misplace the handout and forget to check out your web site? Very high.

Here's what I do:

1. When you give your talk, make sure you mention your web site several times – appropriately, of course. Tell them about a free report on the site that will add to what they've just learned in the talk. Even print that specific URL on your handout.
2. Make sure you mention your free eZine once or twice in the talk as well. Again, you don't have to over-promote to get people's attention.
3. At the end of the talk, let people know you'll be doing a drawing. A small booklet or cassette tape is great for this. Say something like this:

   "I'm going to do a drawing and here's how it works. Please put your business card in the bowl as it gets passed around. If you also want to be on my eZine list, make sure your current email address is on the card and write the word "email" on the back of the card and I'll be happy to add you to my list. If you want to know anything more about my services, just write the word "services" on the back of the card and I'll contact you next week. If you are not interested in the eZine or services, you can join the drawing anyway. Don't write anything on your card and I'll toss out your card at the end of the talk."

So by saying this you've made it very safe to enter the drawing and to join your eZine list. It's total opt-in and everyone who gets your eZine will appreciate it. When I do this, I typically get dozens of cards.

Remember that the eZine is the tool that you use to further promote your service and send people to your web site. In the long run you're going to have a whale of a lot more people visiting your site if you use this simple Action Plan.

2. Using Email to promote Your Site

In Chapter 13, eZines and Email Marketing, I'll get into all the ins and outs of creating an eZine, but in this part let's explore several ways to use email to promote your site.

Promote in your eZine

1. Send out your eZine on a regular basis. Monthly at minimum. Now the heart of your eZine is one or two articles on your area of expertise. But at the bottom of each eZine you want to make space to promote your services or products.
2. Simply write four or five lines that promote that service and then create a live link back to your web site that promotes that service or product in greater depth.

Here's one that I used recently:

> "Hundreds of professional service business owners have worked with me on developing marketing and sales strategies that got them more clients and more money. The amount invested was small compared to the results. If you'd like to learn more about my marketing consulting/coaching services, including fees, go to: http://www.actionplan.com/mentoring.html"

This followed an article about how I helped a client use value pricing to increase the value of a contract substantially. This resulted in a couple of new clients.

If you're using your web site to promote products such as tapes, reports or e-books as I do, your eZine is even more important. It's the engine that drives people to your site to buy those online products. My strategy is no different than promoting services. In every issue I mention one or two online products with links back to the site. The larger your eZine list, the more sales you make every time you send it out. For me, this increased to such a level that within one month of launching this manual I was making more money online than through consulting and coaching.

If promoting online products is the next step for you, I recommend the exceptional e-book – **Make Your Knowledge Sell** by Monique Harris and Ken Evoy. It can be found on the SiteSell web site.

Submit guest articles

1. Subscribe to as many eZines in your field as you can find. Organize them into mailboxes or folders in your email program. It's always useful to see what the competition is doing.
2. Note the eZines that carry guest articles by other InfoGurus like you. Call them personally on the phone to discuss inclusion of your articles in their eZine or on their web site. If you can't reach them by phone, then send a very personalized email saying you enjoy their eZine/web site and would like to write a guest article for them. I actually suggest including your most recent article so they know immediately if your topic and style fits their eZine or web site

3. Don't forget to put a box at the bottom that tells them more about you. The owner of the eZine of web site will usually be glad to let you add this, as you are providing valuable content for free. Add something like this:

   This article is by Joe Blow of Joe Blow engineering and design. Joe is a distinguished engineer who has gained a reputation as one of the most knowledgeable people on... whatever... Joe has a free report on his site, exclusively for the readers of the eZine. Go to http://joeblowengineer.com.

This simple strategy can get you many new visitors to your web site and many new subscribers to your own eZine.

4. Get the e-book, Articles that Sell for a complete strategy on getting your articles published online. Includes lots of sources for placing articles.

List your eZine in online eZine directories.

There are many directories on the web where you can list your eZine. Click on the links below and see if that directory is appropriate for your site. This can be a great way to get new subscribers which, in turn, will drive people to your web site.

E-Zinez.com – http://www.e-zinez.com

The e-Zine Web Ring – http://ezinewebring.hypermart.net

EzineSeek – http://www.ezineseek.com

eZine Search – http://www.ezinesearch.com/search-it/ezine

FreeEzineWeb – http://www.freezineweb.com

Newsletter Access – http://www.newsletteraccess.com

New List – http://www.new-list.com

Nerd World – http://www.nerdworld.com/users/dstein/nw30.html

BestEzines – http://www.bestezines.com

Ezine Universe – http://Ezine-Universe.com

I currently can't vouch for the effectiveness of any of these directories, but listing in them can't hurt! And simply by listing, you also increase your link popularity.

More ideas on eZine promotion in Chapter 13, eZines and E-Mail Marketing.

3. Promoting Yourself Through Search Engines

There are hundreds, if not thousands of search engines and directories on the web. The good news is that there are only a few that get used by 95% or more of people who surf the net. If you get yourself listed on these sites you have it pretty much covered. The main search engines are listed below. The links take you directly to the page where you add your site.

More bad news, however. Every day it seems the free search engines are falling to the pay for inclusion model (more below). There are really only **three top free search**

engines left and one top free directory. The final bit of good news is that Google is the king of the free search engines and gets used more than any search engine on the web. One more bit of bad news... It's getting harder and harder to get to the top of Google's listing!

google.com – http://www.google.com/addurl.html

altavista.com – http://www.altavista.com/sites/search/addurl

alltheweb.com – http://www.alltheweb.com/add_url.php3

opendirectory.com – Actually a directory. Gets you listed in many other search engines. – http://dmoz.org/add.html

aol.com – Gets listings from the open directory.

directhit.com – Now part of Teoma.

hotbot.com – Gets its listings form Inktomi.

msn.com – Gets its listings from Inktomi and Overture.

excite.com – Excite gets listings from Inktomi.

go.com (was InfoSeek) – Uses the results from Overture.

webcrawler – Now uses the results from Overture.

All you need to do (on most of these sites) is add the URL of your web site and sometimes your email. A few ask for some more information.

More and more of these search engines are asking you to pay to get listed (see below) – or at least to speed up the acceptance process. Excite and AltaVista are going this route. Sooner or later most search engines may require that you pay to submit. If you don't, you're left out in the cold.

Luckily, the most popular search engine right now, Google, is still free to submit to, but Google depends a lot on link popularity to get you to the top of the list, not just on good keyword placement. Being linked from many other sites (at least 100) and also being on Yahoo means a lot for your Google listing.

Pay for inclusion in directories

More and more search engines and directories are going the "pay for inclusion" route. This means you have to pay to get listed. Simple as that. And paying doesn't guarantee you'll get to the top of the heap either. In some cases, as with Yahoo, you actually have to pay just to be considered for inclusion. It can be expensive but it can also be worth it.

Yahoo – http://docs.yahoo.com/info/suggest

Yahoo is a very important place to be listed, but it is much more difficult than the search engines that list your site automatically through the use of "web robots" or "web spiders."

Yahoo is a web directory that uses real live people to evaluate and list your site. So first, you need to have a pretty good site; two, it seems that if there is huge competition in your category it reduces the chance of you being listed; three, it seems to be easier

to get listed in local directories of Yahoo; and fourth, it seems to be partly based on luck. The only real solution may be to list your site often until you finally get listed.

A few Yahoo listing tips.

It's always good if your site starts with A or a numeral. You'll be listed closer to the top. If your business name is "Management Strategies," consider naming it "1Management Strategies."

Always put your **best keywords** in the **description** for your site. This is how I got listed at the top of the page when people use my best keyword.

Find the very **best category** for your site. Don't rush here. Take your time and make sure you suggest a category people are likely to browse when looking for you.

Yahoo has a big barrier to entry. Perhaps it's an opportunity. If you are a business site, you now have to pay $299 for the opportunity to have your site reviewed by Yahoo staff using their Express Service. They don't even promise you'll get listed! But the good thing is, if you have a good site, your chances are a lot higher. This will reduce the traffic of lousy sites being submitted and you'll likely get in a lot more quickly. For complete details on their Express Service, click here. Also note, that if you are accepted through Yahoo's Express Service listing, you'll also have to pay an additional $299 every year to stay in the directory (ouch!).

Just follow the rules closely. It can definitely be worth paying $299 to get into Yahoo. I get a sizable proportion of my web traffic from Yahoo, and that's ultimately worth thousands of dollars.

Looksmart – http://listings.looksmart.com/?synd=&chan=lshomepg

Looksmart is much like Yahoo in that it's also a directory, not a search engine. Looksmart has recently changed their listing to a pay-per-click model. The only problem is that everyone pays exactly the same for getting a click-through – 15¢. When you list in LookSmart you also get listed in several other search engines and directories that are part of a network: Microsoft's MSN, AltaVista, Netscape, iWon, etc. This may be a good investment for new sites who want to show up on the net faster.

Lycos – http://insite.lycos.com/searchservices

Lycos recently became a pay-per inclusion directory. Now run by Insite, you actually pay $35 for inclusion into the FAST directory and $39 into the Inktomi directory (which lists you in places like msn). Confusing yes, but now if you don't pay you're not going to show up.

Ask and Teoma – http://ask.ineedhits.com

Two search engines that now are pay for inclusion. You pay one $30 fee to be included in both directories. This supposedly keeps you in the directory for a year. I guess this means they'll ask for another $30 next year. We shall see!

Pay-per-click search engines

These search engines work on the principle of "pay as you go." You list your

site on the search engine and bid for certain keywords. When someone uses your keyword in a search and you have paid enough per click, your site listing will appear at the top of the list. (More on keywords below.) When the person browsing the site clicks on your link, your account is charged whatever your bid fee is. You may bid anywhere from 1¢ to "the sky's the limit."

The most popular pay per click engine is Overture.com**.** (Was Goto.com) But you can find a complete directory of pay per click sites here: http://payperclicksearchengines.com They have a list of the Top 10, all of which get a decent amount of traffic. Check them all out and at the very least, list on Overture, then try out some of the others. I also like FindWhat and Kanoodle quite a bit. Kanoodle is the easiest to use.

This is exactly what you need to do. First locate your best keywords on the Overture Search Term Suggestion Tool. (One of the most valuable but little known resources on the web.) Then starting with one pay-per-click search engine at a time, first search for each of your keywords in that search engine and note how much people are paying for that term.

You want to bid high enough so that you are in the top 10 listings at least. The higher the better. The top three is the best. On the other hand you don't want to pay too much either. If your listing is sufficiently different from the other listings it won't matter so much if you're on top.

Then find the section where you submit your listings with the keywords you've chosen. You can list as many keywords as you like but you'll probably get the best result on the top 4 or 5 keywords for your site. For instance, I listed 20 keywords on Overture.com but just one keyword got 30 times the traffic that all the other 19 put together! Make sure you have a good title for each listing and a good description as well. Then you pay a deposit by credit card against the actual click-throughs.

Make sure to check back every once in awhile to see how your listing is doing, how many click-throughs you're getting, etc. By carefully managing your accounts you could get several hundreds of click-throughs to your site every month. I recommend you list yourself in all 10 of the top pay-per-click sites listed on the site mentioned above.

How much can you afford to pay for a click-through? It depends. If you have a good idea of how many people go to your site and how many new clients you get because of your web site every month, you can determine what a fair price is for a new visitor. For instance, if you get 1,000 visitors to your site each month and you get one new client because of the web, and your average client pays you $10,000, then you know that each visitor to your web site is worth $10 to you. Would you pay another $1,000 per month to get another 1,000 visitors that would result in another $10,000 client???

If you answered no, it's time to do something else other than be self employed! The point is, if you know how much you are making from the traffic you're

getting, you can pay for traffic all day long and make it pay if you're buying it at a profitable rate.

Google AdWords Select

This is the newest and most exciting entry into the pay-per-click search engine wars. And for my money, it's better than Overture or any other pay-per-click search engine for several reasons.

Overture actually doesn't get visited a lot. They sell their pay-per-click results to a whole bunch of other search engines like MSN and Go.com. But often the search engines they sell the results to only list the first three or four sponsored sites. This means if you haven't bid high enough, you won't show up at all in Overture's partner sites.

Enter Google AdWords Select. Take a look at the search results on a Google page. You'll see little 3-line sponsored links at the right of the page in pastel colored boxes. Sometimes just one or two, sometimes several ads appear on the page. The great thing about this is that a LOT of people visit Google, more than any other search engine. So if you bid for an AdWord Ad on Google, you're going to get seen by a lot of people.

The great thing is that the bid price for Google AdWords is a lot more democratic. Everyone ends up paying very close to the same amount for their bids. And the bids tend to rotate somewhat on the page. This means that you'll turn up sooner or later. If you bid a little higher, you show up more often.

What I found is that I got a lot more hits through Google AdWords Select than I ever got on Overture and the price was much lower – about 30¢ to 35¢ per click through. That means for every three clicks or so through an Adword, I pay Google $1.00 on my credit card.

Now I could write a whole manual on how to use this great new search engine promotion tool but I just don't have the room. Simply go to Google, click on "Advertise With Us" on the Google main page and dig into it and learn how it works. And then test a few 3-line ads with several different keywords.

One thing you'll learn very fast is what keywords are hot and which ones aren't. If your ad doesn't get enough click-throughs, Google pulls your ad, so you quickly become a better ad writer and learn which keywords get the most traffic. Definitely worth it if you want to drive traffic to your site almost immediately.

Other specialized directories

There are so many directories on the web that it could take a lifetime to list your site in all of them. And you wouldn't even want to. Many are useless to your business. What is worthwhile is doing some searching in your business category to see if there are some directories just for your industry.

For instance, I found a small business site that listed all kinds of resources, so I submitted my information and got listed there. This site gets lots of hits so it increases my chances of being seen by visitors to their site thereby increasing the hits to my site. If you got into half a dozen of these industry-related sites, your hits will likely increase. Find them by spending an hour or so to search on Google.

Three that you might find useful as an Independent Professional are Guru.com, elance.com**, and** sologig.com All have places to list details about your services. Potential clients look for professional services on these sites. So not only may these sites drive traffic to your web site, they may be good sources of hot, qualified leads. Definitely worth the few minutes it takes to list.

Multiple submission

There are many sites on the web that will submit your site to all of the search engines and directories above, plus some. The word in the web community is that it's best to hand-submit to every top search engine and that all the other directories don't get much traffic and really aren't worth the effort. I'm not so sure about that.

I found what I consider to be a very good multiple submission site by our ubiquitous friends Microsoft. It's called bCentral. I used it to submit my site and actually have had very good results. After listing (with the right keywords), I came up near the top of several search engines. Not bad, I thought. It also lists you on several of the second tier engines. And it lists you in all the Inktomi affiliated sites like Hotbot within 48 hours. This service costs $50 for the first web page listed and $30 for additional pages. Since most search engines automatically index all the pages on your site, this works quite well. They have recently upgraded the service so it's even better than ever. Recommended.

Action Plan

1. List yourself in all the free search engines either one at a time or through bCentral. And then pay $299 to Yahoo and perhaps to Looksmart to list in their directories as well. You'll be well-covered.
2. If you are not using bCentral, re-list yourself in the main search engines at least monthly. One way to make this easier is to bookmark all the submission pages listed above and put them in a folder in your Favorites (Explorer) or Bookmarks (Netscape) browser so that you can access them quickly.
3. Try some of the Pay-Per-Click search engines, especially Google AdWords Select to see how much new traffic starts getting directed towards your site.

4. Keywords (Getting Found on Search Engines)

It is one thing to get listed on search engines. It is quite another being found. When someone types in a few words like "management consulting" or "process improvement" will your site come up? It all depends on how you've optimized your site for the right keywords. On the web and in search engines, keywords are king!

The concept is really quite simple – find the best keywords for your site and optimize the home page and other pages on your site for just one of these keywords for each page. That's right, each web page doesn't need a zillion keywords. What you

want to accomplish is "keyword density" on any given page which will increase the chances of that page coming up in a search engine search.

So if you determine that "management coaching" is the ideal keyword for your site (keywords are sometimes a two- or three-word phrase that people type into a search engine box), then make sure "management coaching" is all over the page. We'll tell you how much and where a little further down.

How to determine keywords

Here's the fastest, most effective way I know to find the best keywords for your web site. This basic strategy is distilled from books, reports, online information and the advice of experts. It's also the basic strategy I use and it has worked quite well, getting me on the first page of many search engines with the best keywords. It has dramatically helped my web site traffic.

1. **First ask your clients this question:** "If you were looking for a business like mine on the web, what keywords might you use?" If you get many responses for one or two phrases, that's a good start.

   For instance if you did process improvement they might include search terms such as:

   Process improvement

   Process reengineering

   Improved cycle time

   Time to market

   etc.

2. Next go to the following link for the **Search Term Suggestion Tool** on overture.com – http://inventory.overture.com/d/searchinventory/suggestion

   This is a nifty little tool that lets you know how often people are using certain key words in searches. For instance, if you look up marketing, you'll see that it is used very frequently, but also frequently used is "marketing plan." So if you put both marketing and marketing plan as keywords in your marketing site you are more likely to have your site come up higher in search engine results. Spend some time putting in keywords that relate to your service and determine which ones are more likely to be entered into searches.

   This is a fun and fascinating process as you'll discover popular key words that you never thought of before.

   Another similar service (but fee-based) is called Word Tracker – http://www.wordtracker.com. It's much more extensive and gives you a rating on every single keyword you choose.

3. **Now do a web search using the keywords you've found.** Google is the best because it tends to get very relevant search results. I also suggest trying http://www.metacrawler.com because it compiles the results of several search engines and directories and comes up with very good results most of the time.

So if you put in "management coaching" and you get several sites closely related to yours, you've hit pay dirt. You've found keywords that will likely work to get your site listed at the top of search engines.

4. **Now look at the keywords on the site you've found.** Look under the menu **View>Source** and the html for that site will come up. Look at the top of the page at the words next to the "Meta Tags" and you'll see all the keywords that are being used on the site that you can't see on the page itself. You should consider using some of those keywords on your site as well.

Let's look at where to put keywords on your site

Your site gets indexed by the keywords on your site. There are six important places you can put keywords:

a. **Titles**
b. **Content**
c. **Keyword Meta Tag**
d. **Description Meta Tag**
e. **Alt Tags**
f. **Link Tags**

a. Titles

The most important, by a country mile as far as I can determine, are the Titles of the pages on your sites. Titles are entered into the HTML and are the first thing almost all search engines see. Did you ever notice that when you do a search, that the sites that come up first usually have the search words right in the title of the site?

You want to do some serious thinking about your page titles. You also have to be aware that there may be thousands of pages with "Management Consulting" in their titles. So you want to think of words that are more specific. If you use three words or three word clusters you have a better chance of being found. For instance, "Management Consulting Services" or "Management Consulting Results" or "Management Consulting SF Bay Area"

You can put all of those phrases in your title and you stand a better chance of being found by search engines. You may use the same title on all your pages or different titles on each page. The way search engine robots seem to work is that they visit your site and then visit all the pages on your site, indexing the titles, key words, meta tags, etc. If you have different titles, then you theoretically increase your chances that some combination of phrases will come up in the search.

Of course, you want to use words that are relevant to your business. It is inadvisable, perhaps unethical, to put the names of your competitor's businesses in your title or meta tags.

The title tag will look something like this:

```
<TITLE>Management coaching services for productivity improvement</TITLE>
```

b. Content words

Next, content words are very important. What you want to do here is to make sure important words, likely to be used in searches, are at the very top of your page. Usually in the first sentence or paragraph. The big thing everyone is talking about is "keyword density." This is where things get tricky. Why? Well all the search engines seem to favor different keyword densities. They prefer anywhere from 2% to 6% of the words on the site to be keywords to get listed favorably.

Here's where I think you can go seriously crazy. If you work to optimize different pages on your site for different keywords and different search engines, that's about all you'll be doing. I think it really makes sense if your business is totally web-related. If it's not, I think you can spend way too much time in this area.

My compromise solution is to place your main keywords in the body of the content four to six times. If you do it any more it's going to start looking funny, anyway. How many times can you say "management coaching" on one page without overdoing it?

c. Description meta tags

Your Description Meta Tag gives a brief synopsis of your site. Not only should it contain your keywords, it should be a good, readable description because on many search engines this description will be placed immediately under your title in the search results. So something like this might work well: "Offering management coaching services guaranteed to improve the productivity of your management staff."

The description meta tag will look something like this:

<META NAME="DESCRIPTION" CONTENT="Offering management coaching services guaranteed to improve the productivity of your management staff.">

d. Keyword meta tags

The keyword meta tag has been somewhat abused by listing every single possible keyword under the sun. Apparently that doesn't help much. Put your keywords in this meta tag a few times in different formats like so: "management coaching, coaching for managers, management coaching services, management coaching training, management coaching for executives."

Several search engines will actually penalize you if you use too many keywords in a row. So make sure they're in there, but don't overdo it.

The keywords metatag will look something like this:

<META NAME="KEYWORDS" CONTENT="management coaching, coaching for managers, management coaching services, management coaching training, management coaching for executives">

e. Alt tags

Alt Tags are the words connected to graphics on your page. In most web creation programs it's easy to add them. You just click on the graphic and a box comes up where you enter the Alt Tag. Just enter your main keywords. This works best for the top graphic on your page which may include your logo.

f. Link tags

If you have a link on the page that goes to another page it won't hurt if that link is one of your keywords as well. It tends to upgrade the search engine rank. For instance, if your keyword is Management Process, then somewhere on the page you might use Management Process in a link, as shown. (This one doesn't go anywhere.)

5. Electronic Networking

Another way to increase hits is to find other web sites that offer complimentary but not competitive services and then trade links. For instance, for me, sites on printing, market research and sales workshops are complimentary, so if I found local sites with these service I might ask them to list my site and provide a link and in return put a link to their service on my site.

This can work but it's also tricky. What if they don't have a quality service? You need to do your due diligence and talk to these people on the phone, not just trade email messages. I think there is great potential in this area but it can be quite time-consuming.

Link popularity

It can pay to be linked on other web sites, in search engines and directories because the more places you're linked, the higher you show up on some search engines. In fact this is the principle behind Google. Their aim is to list popular sites, and they base that popularity on how many places on the web you're linked. You get even better rankings if you're listed on other popular, high-traffic sites such as Yahoo.

Want to know how many places you're linked on the web?

> Altavista **or** Google – put "link:yourdomain.com" in the search window and press enter and all the sites with a link to your domain will be listed. Very cool.
>
> Also check out Alexa and see your site's popularity compared to all other web sites. Also shows the total links to your site.

This will list all the pages you are linked to in the search results. If you're only listed in a couple places, it's time to get to work! Even if you traded links with other businesses and nobody even saw those links, it would benefit your link popularity.

One of the best ways to get links on other sites is to write articles that other people will want to put on their sites. Every week I get requests from subscribers to my eZine, More Clients, to place the current issue on their site. I always say yes as long as they put in a link back to my web site. As a result, there are dozens of sites out there with my articles and links back to Action Plan Marketing.

When I checked out my link popularity I found I was linked over 450 places on the web on all sorts of sites: directories, links to my articles, places I've spoken. It goes on and on. I think it's really worth the time to get links on other sites, not just because of link popularity but because you might get linked on a site that is visited by qualified target clients. And that almost always means more traffic for you.

Web sites are the future of marketing for ALL businesses

We hear a lot about billionaires being made on the Internet, web sites that get thousands of hits a day and millions of dollars of e-commerce transpiring every minute. When we think of that scale, the web and Internet can be intimidating and overwhelming. We wonder how we fit in.

But you need to think of a web site as a marketing tool that simply makes it easier for your clients and prospective clients to do business with you. You won't become a web billionaire if you're a small professional service, but you are likely to become more successful, attract clients you wouldn't attract otherwise, shorten the sales cycle and increase your word-of-mouth business. I recommend that you make the creation of a web site a top priority.

Action Plan – Web Site Promotion

Once you've created your web site, start to promote it this way:

1. Identify your main Keywords.
2. Place keywords in all the recommended places in your site. Pay special attention to the Home Page, placing the highest ranking keywords there.
3. List your sites in all the main search engines and some pay-per-click engines.
4. Establish an eZine – get an eZine sign-up page on your web site and get listed in several eZine directories.
5. Start using off-line promotion strategies one at a time.

Books on Web Marketing

Maximize Web Site Traffic – Robin Nobles & Susan O'Neil

Make Your Site Sell - an e-book by Ken Evoy

Guide to Obtaining a #1 Ranking in the Search Engines

an e-book by Ryan Allis.

This and other books can be found online in the Action Plan Marketing Bookstore.

Notes

Chapter 9

Generating Referrals

People Like to Refer Business to You

When I ask business owners how they find most of their clients, the answer is almost always, "through word-of-mouth." That is, clients and associates who refer new clients to them are responsible for the largest portion of their new business.

This is both good news and bad news about word-of-mouth.

> **It's good news** because, if you're getting a lot of business through word-of-mouth, it means you're doing a great job. People like you and your work, and they are talking to people about you and how you can help them.
>
> **It's bad news** because if most of your business is coming from word-of-mouth, you may be taking a rather passive stance with your marketing. You're just waiting for the referrals to come in. You're not doing much else to generate new business.

Now the funny thing about word-of-mouth is that although much of our business comes this way, very few people have any **deliberate strategies to increase word-of-mouth business.** Why, even the thought of a strategy for increasing word-of-mouth seems strange.

Isn't it just supposed to happen because you do good work?

The answer to that is yes and no.

> Yes, word-of-mouth is a result of doing good work, of course.
>
> But no, there are many other things you can do to generate word-of-mouth. In fact, your plan for generating referrals may be **your most important long-term marketing strategy.**

There's something else important that you need to know:

People **Like** to Refer Business to You!!

Other than doing a great job, why do people refer you? They like you and feel that you can help their friends or associates. This is pretty obvious. The other is also obvious but often missed.:

People like to help people. Why? Because it makes them look and feel good!

Am I being cynical? Not at all. Do you ever remember sitting around a table with some friends and someone says they're looking for, say, a good house cleaner? All of a sudden everyone at the table starts to vie for who can give the best referral. We want our friend to use our reference because we get an ego boost. We win. Someone noticed us and paid attention to us. That feels good.

So word-of-mouth marketing is happening all the time because it makes people feel good to make a contribution. Heck, if we gave referrals and our friends didn't use the people we referred, we wouldn't feel so great.

So in order to increase referrals you need to remember a very simple truth: Our referral sources want to both help us and their friends because it makes them feel good. It reflects positively on them.

So doesn't it make sense that you're going to get a lot more referrals if you do everything possible to make your referral sources feel even better? Of course!

The Seven Key Referral Strategies

Now let's look at the seven key strategies for increasing word-of-mouth and referrals in your business. These seven proven strategies will help you dramatically increase the referrals you receive. Remember that just one strategy can mean dozens of new clients over the lifetime of your business.

Using several of them can mean the difference between average and extraordinary success. And the great thing is, most of them cost very little or nothing. The seven strategies are:

1. **Performance** – Building value and trust
2. **Visibility and Communication** – Make sure people remember you and understand what you do
3. **Just Ask** – And you shall receive
4. **Rewards** – Will make them refer more
5. **Endorsements** – Build on the relationships you already have
6. **Professional Referrals** – Build a network of influencers
7. **Building Relationships** – Build good feelings with clients

Strategy #1 – Performance Means Building Trust and Value

First of all, no one is going to refer business to you if they don't trust and value you. But you don't determine value, your customer does. If you think you do a great job but your client thinks it's so-so, then guess what? It's so-so. This is often a hard lesson to learn. **We judge ourselves by our intentions. Clients judge us by our actions.** So if we promise something and build a certain expectation and then don't deliver that expectation, we will end up with disappointed clients.

And guess what? Disappointed clients, don't give referrals. And the word-of-mouth they spread is not the kind you want spread! So the bottom line is that you

must, above all else, perform. If you don't, everything discussed here is pointless. We'll go into Performance in even more detail in Chapters 22 and 23 of the manual but here are some of the more important points.

Performance includes the following *little* things:

- Returning calls (and emails) promptly. It's more important than you think!
- Keeping your word – doing what you say you will do
- Meeting your deadlines (and making ones you can meet)
- Communicating when you run into problems
- Apologizing when you make a mistake
- Doing a little extra or going the extra mile
- Having a good sense of humor – not taking yourself too seriously

Performance also includes the following *BIG* things:

- Your intention to make a **contribution**
- Your **passion** and your **love** for your work
- Your **personal connection and commitment** to your clients
- Your **knowledge** and **expertise**
- Being **authentic** and **sincere**
- Your **insight** and **integrity**
- Being **professional** and **courteous**

None of this stuff "just happens." You need to work at improving performance "by design." Take one or two of these areas mentioned above and create a simple action plan for implementing it in your business.

Create a policy, for instance, to return all calls and emails within 3 hours. Seems simple, but it will stretch you and make you see how much further you can go. When you nail that one – work on another one until you can definitely say you have exceptional service.

It will take awhile, but you'll slowly but surely start to build a reputation as someone who really cares and takes care of clients.

Action Plan

1. Determine one area where you know you could improve performance and service and where you know it would likely increase referrals.
2. Let's say this area is sending "thank-you" notes to all new clients after the first meeting. This is a good one, by the way. Someone who attended a talk I gave said this one idea was responsible for completely filling her practice!
3. Buy a big box of thank-you cards. Pick something that's appropriate for your business. Put them in a place in your office where you can't miss them.

4. As soon as you have completed your meeting with that client, grab a thank you card and write a brief note: "I really appreciated meeting with you today. I'm confident we can make great progress with this project. Thank you for trusting me to assist in your success. Sincerely..."

Strategy #2 – Visibility and Communication

Marketing Starts with Visibility. Whether it's in-person, by mail or in your email box, if you don't have a visible marketing presence, nothing is going to happen. Once you're visible, then you need to communicate the value of what you offer.

Nothing is more important than communicating how you can help your clients. Whether it's an Audio Logo, brochure copy, a letter or a sales presentation, it doesn't matter. Just make sure that when you communicate about your services, people get it. Let me give you a simple example in a networking context.

Often at a networking event someone will ask me what I do and I'll reply with the standard Audio Logo: "I help professional service businesses who are struggling to attract new clients." Now for whatever reason, that person may not need or be interested in my services but later on in the event they may introduce me to someone else and suggest to this other person that I can perhaps help them.

What's happening here? You might call it "instant word-of-mouth through effective positioning." Simply by hearing my clear positioning statement I get an immediate referral. The interesting thing is, this happens all the time and it doesn't happen accidentally. This is one of my strategies for building word-of-mouth business.

In the same way, quality marketing materials, promotional activities and even a professional sales appointment can turn into a word-of-mouth referral, sometimes from someone you've never even met! All of these elements of marketing speak to the quality of your work and the level of service you provide.

Some specific ways communication can increase referrals

- **Positioning** – People better understand exactly what you do and what solution you provide so they can easily share this with others.
- **Packaging** – People visiting your web site understand your value and tell associates to check out your site.
- **Promotion** – You send an email newsletter to your list and it contains information that others want to pass along. You are continually in front of your prospects with valuable information.
- **Persuasion** – In meeting with a new prospect, you explain the benefits of your service so clearly that they want to tell an associate about what you do as well.

Action Plan

1. Look at an area of your business where your communication is less than clear and do something, anything to improve that communication.

2. For instance, if the opening paragraphs in your web site talk all about you but neglect to talk about how you can help your clients, take half an hour or so to do a rewrite until it communicates with impact.

   I can't emphasize enough the importance of this one strategy. Marketing IS communication. And if you don't do it well you won't get nearly as many referrals as you deserve.

Strategy #3 – Just Ask for Referrals

Clients are often more than willing to give you referrals so it never hurts to ask!

The key to receiving referrals from "just asking" is to plan your strategy ahead of time. It's too late when faced with a client who's happy with your work and you blurt out some inanity like, "Well, make sure you send people my way." They'll say "sure" but nothing will happen.

Or even if they do refer, they'll do it in a way that reduces the chance of the "referee" ever calling. They don't call, not because they don't need your service, but because they don't know you and it feels risky for them to call. So you need to set things up with your referrer so it increases the chance that something will happen.

Action Plan

1. **The timing of asking is the key to this working.** When you are discussing the results of your service and they are very enthusiastic about what you've done for them you can say something low-key such as: "Who else do you know who would like to receive similar benefits?" or "Who else do you have for me?" Then get out your note pad.

2. **Script your request so that you are putting the referrer and the referee ahead of yourself.** "I'm really glad you've been happy with the work we've done together. My purpose as a business is to make a difference to my clients. I'd like to know if you have some business associates who are looking for the same kind of results we were able to accomplish?

3. **Make it very clear exactly who you are looking for as clients.** Don't make your referrer do a "global search" of their internal database. Narrow it down for them. "The kinds of people I really like to help are HR managers in Silicon Valley firms who are frustrated with the level of service provided by their company and who want to contribute to lasting change in their service organization."

4. **It also helps to tell people HOW to refer people to you.** This is very important. People are more likely to do what you say. For instance, don't say, "If you know anyone who needs my services, have them give me a call." Instead you might say, "If you know someone who needs my services, give me a call first and we can discuss if I can help them and the best way to approach them."

5. **Direct them to your web site –** A web site is a great way to facilitate referrals. Because even people that need you are often reluctant to call. If they can check you out on the web first, they will know more about you when they call. What I say is this: "If you know someone who's interested in my services, I suggest you point them to my web site first to give them a better idea of what I do and then they can call me."
6. **Tell clients ahead of time that you expect referrals.** Let them know that your business grows primarily through referrals. Let them know that your job is to provide such great service that they want to give you referrals. Ask them if you provide that level of service, can you count on receiving referrals from them?

   Be explicit in your request. And when the project is complete, make sure to ask them again, reminding them that they said they would have some referrals for you. "When we started this project I mentioned that I'd be asking for referrals if I met or exceeded your expectations. Since I know you're very happy with what we accomplished, I'd like to know what other companies I should be talking to."

Strategy #4 – Rewards and Thank-Yous

One of the most obvious ways to increase referrals is to reward referring behavior. That is, make them feel even better for referring. What are some simple, inexpensive things that can accomplish that?

Action Plan

1. **Thank-yous for referring.** Let them know by call, card or email that you sincerely appreciate the referral. Keep them posted, whether they got the client or not, and keep them informed about progress with the client.

   By the way, the more personalized this is, the better. One of my clients is an amateur photographer so she makes multiple copies of photos and pastes the pictures on cards which she uses for thank-you notes. People don't tend to throw them out so easily.
2. **Thank those who refer often by thanking them even more.** Ask them out to lunch and ask how you can help their business. I recently got a referral from a friend and associate, David Garfinkel. I sent him this email in thanks:

   > Hi David,
   >
   > Thanks so much for the referral. Coming from you it means a lot. She sounds like a great person. I'm sure I can help her. I really like working with super-smart people.
   >
   > Did I tell you I was going to this Internet Seminar with Declan Dunn next week? What I'd like to do is get together with you after I return and share some of what I learned.
   >
   > I'll give you a call when I get back.
   >
   > All the best, and thanks again for the referral to Sabrina.

3. **What's one of the best things you can do to thank them?** Listen to them. No kidding. People listen to us so little these days that listening is actually a gift. Call them up and say: "I really appreciate that referral. I'd like to thank you by giving you **1/2 hour free** on the phone to help you with any problem you may be dealing with."
4. **Thank you gifts.** Give people who have referred clients to you this year a gift at holiday time or immediately after the referral. The more referrals, the more lavish the gift. (Don't get too carried away. It can be hard to continually up the ante.)

   Special Report – The Number One Strategy for Generating More Referrals

   This is a special report on the most effective overall strategy for generating more referrals and word-of-mouth business. Just click here to get this report:

   http://www.actionplan.com/tellafriend.html

Strategy #5 – Endorsements or Joint Ventures

Endorsements are a very powerful way to connect with a new prospective client using the power of your existing relationships with current clients and/or associates. This is a very proactive way to generate referrals.

You make an offer to a client or associate that would benefit their clients. Everyone wins. You win by getting referrals. The client wins by helping their clients and the client wins by receiving the value of your service.

Action Plan

1. **Endorsed letter.** First you need to locate someone who serves the same clients as you but is not in direct competition with you. This associate then writes a letter about you to potential clients on their letterhead, with a special offer for your services. You actually do the letter writing and pay for the stationery costs and the postage.

   This is an extraordinarily powerful strategy that can generate amazing results but it is not done enough with professional service businesses.

   I've been writing and rewriting a letter of this sort for a client who does nutritional and weight loss counseling. She has an associate who is a therapist who sends out a marketing package three or four times a year. We enclose a letter "from the therapist" about my client's services on the therapist's letterhead. My client pays for copying and postage. She typically gets 10 times her investment back in new clients.

   Some other possible connections might be:

   Training company endorses management program

   Management consulting endorses marketing consultant

   Writer endorses graphic designer

   Web designer endorses hosting service.

   The key is finding associates who have clients who are just like your clients but there is no competition between you. This is also known as a "host – beneficiary relationship."

2. **A gift from you.** Get your business associate to give their friends/associates a gift from you. You plan the campaign and pay the cost.
   - Introductory service at a discount
   - Special reports or cassette tape
   - Free seminar or invitation-only events for clients and their associates

   Your associate writes a letter that essentially says: "I have a gift for you. A valued friend and associate of mine who does XYZ has made a cassette tape that is so valuable I wanted to give you a copy. Please give it a listen, I know you'll find it as useful as I did."

   The cassette tape, of course, not only gives valuable information but introduces your services. You can see that this method is many more times effective than sending out cassette tapes to people you've never met before. Your credibility is assured because you come recommended by your associate.

3. **Endorsements from subscribers.** A few years ago I wanted to get my email newsletter off the ground. I was counting on referrals but I wanted to do something that would move the process along faster. What I did was send an email to all my current subscribers and let them know I had prepared a special, exclusive report on the science of persuasion, based on the book "Influence" by Robert Cialdini.

   I let them know that I'd be happy to send them a copy of this report if they referred 5 people to my newsletter. But they couldn't just give me five names. They had to inform the referee ahead of time and get their agreement to subscribe. Then I would send a copy of the report to both the referrers and the referees. I even gave a sample note that they could send to their friends by email.

   The result was that in 2 or 3 weeks I had amassed about 300 new subscribers. It was a lot of work sending out all those reports (even if it was by email) but the exercise was well worth the effort and proved that if you ride on the coattails of an endorser and offer a reward for referring, the results can be spectacular. More about how to automate this process in Email Marketing.

   I believe the "gift from you" strategy is immensely powerful, however it is done very infrequently. Therefore it always feels fresh. Think of who in your client base has associates who would be interested in your service and then plan a strategy to contact them in this manner.

Strategy #6 – Professional Referrers

There's a whole other category of people who can refer business to you. That's other professionals who provide services to your clients but are not competing with you. For instance, mediators get referrals from attorneys, financial consultants get referrals from accountants, management consultants get referrals from bankers and doctors in one specialty get referrals from doctors in another specialty. Usually this category of Professional Referrers are unlikely to do an endorsement letter for you (see above) but when they have a client who needs your services, they may pass on your name.

How do you become the preferred provider for these "Professionals Referrers?"

Action Plan

1. **Determine who your best kind of Professional Referrers are first.** Just because you want to be referred by bankers doesn't mean they want to refer their clients to an independent professional like yourself. I've seen a lot of people work at this with no results because that particular professional wasn't looking for their kind of service.

   Once you've determined that you have a category of professional who refers people from your profession, you need to develop an approach to get their attention. You need to realize that they will never refer a client to another professional unless they have met with them first. So your first job is to set up a meeting.

2. **The best way to get a meeting is through a personal introduction.** If you have an associate who knows this professional you can arrange for an introduction. Let your associate know exactly what you're trying to accomplish. Perhaps you want to set up a three-way meeting. Your associate might say something like this to your potential professional referrer: "I've known John for some time. He's a very successful management consultant who works in the high tech field. Most of his business comes through venture capitalists like yourself. I thought you'd be interested in meeting with John and hearing about some of his success stories." This is the best possible way to connect with your professional referrer. If things click, new business may indeed come your way.

   If you don't have someone who can introduce you personally you need to make the entree yourself. You can do this through networking or through direct outreach. Let's cover networking first.

3. **A good example of this was an executive recruiter I worked with.** Her best referrers were venture capitalists. Since she happened to be a Harvard graduate and many venture capitalists are also alumni of Harvard, she had an immediate "in." She joined the local Harvard Business Forum and got very involved. She met many venture capitalists, put them on her mailing list and kept her most recent results in front of them through monthly mailings. Before long she was getting a lot of very qualified referrals.

   So work at tapping into a similar kind of network and then work that network as actively as possible.

4. **Direct outreach is connecting with potential professional referrers through letters and phone calls.** Send a letter that communicates clearly and directly what you are looking for. Let them know of your track record and that you depend mainly on professional referrers for new clients. Send them an article or a report that highlights your expertise. Then follow up with a phone call to set up an appointment. Remember, you're really not selling anything, you're making yourself available as a resource. It's in their best interest to meet with you.

See the chapters on Direct Outreach and Making Appointments by Phone for more detailed information on how to do this successfully.

Strategy #7 – Relationship Building

Ultimately you will keep getting referrals if people feel good about you, if they value and trust what you do and feel confident that you can provide a similar service for their friends and associates. To do this you need to work at building that trust over time. It doesn't necessarily happen instantly, in fact it often takes a long time.

Here are some important things that help build those relationships.

Action Plan

1. **Develop relationships with clients beyond what you sell.** Get to know them. Let them get to know you. Go out to lunch. Invite them to events.
2. **Acknowledge the person who brought the two of you together.** Be known as a person who gets referrals and develops solid business relationships. They'll want to be a part of that.
3. **Stay in touch over the long term.** From a personal note to an email newsletter. Remember, the only crime in business is being forgotten!

   When is the best time to call? Spontaneously, when you think of them. Just pick up the phone and say you were thinking of them and ask them how they're doing. This "no-system-system" is easy, effective and fun.

If you only use a few of these strategies, I guarantee that you'll start generating more referrals. I recommend you only work at one or two at a time, measure the results and then add more to your ongoing business activities.

We'll close by developing an overall action plan for generating more referrals.

Action Plan – Generating Referrals

Who?
Who are the clients or other business contacts who are most likely to give you referrals? What would motivate them to give you referrals — that is, what's in it for them?

What?
What systems and strategies will you use to generate more referrals? Performance, Communication, Just Asking, Rewards, Endorsements, Professional Referrers or Relationship Building?

How?
What letters, calls, mailings, scripts, etc. do you need to develop and implement to start the referral-generation process?

When?
By when will you start? How will you fit this marketing activity into your schedule?

Books on Networking and Referrals

Endless Referrals – Bob Burg

The Secrets of Savvy Networking – Susan Ro Ann

Dig your Well Before You're Thirsty – Harvey MacKay

Secrets of Power Networking – Sandy Vilas

These and other books can be found online in the Action Plan Marketing Bookstore.

Notes

Chapter 10

Networking

Getting Known Personally

People like to do business with people they know. And one of the very best ways to get known is to network. It's a great way to get started as an InfoGuru, and it's a great thing to continue to do because it also generates lots of referrals.

In fact, the more you network, the more referrals you get. It's a simple matter of visibility, familiarity and trust. People who see you, get to know you and have a better sense of what you do, are more likely to refer people to you than people who don't know you that well and don't know what you do. So networking can and should be a key referral generation strategy.

Often I ask people how their networking is working for them. Once a photographer told me that 85% of his business came from referrals within his professional organization. Another, a car repair shop owner, said 1/3 of his business or 1/3 of a million dollars in business came either directly or indirectly from his networking group! (He had belonged to this weekly morning group for 17 years.)

But before we get into the how-tos of networking, I think we need to dispel a number of myths. And these networking myths are what keep InfoGurus away from networking.

Networking Myths and Facts

Myth – Networking is nothing more than cocktail mixers. Since I'm not a very social person, networking isn't for me.

Fact – Cocktail mixers are just the icing on the cake of networking. They are places to meet those you already know, not necessarily the best place to meet new contacts. There are other places to start.

Myth – The only places I can find to network are amongst my peers and competitors. Those can't be good places to network.

Fact – Networking amongst peers can be a great place to network. After all, they speak your language and know what you do. Although they may be your peers, often they are not competitive because they have different specialty areas and are looking for other specialists to refer clients to.

Myth – I can't network with potential clients because they'll think I'm a predator, only interested in their business.

Fact – Networking with potential clients, such as an industry group that you serve can be a great place to network, if you do it appropriately. Contribute to the organization. Serve on committees. Don't oversell but always clearly share what you do. You'll often have little competition.

Myth – Morning "leads groups" that meet weekly are a waste of time.

Fact – It depends on the kind of business you're in. Groups of this kind often cater to individuals. Real estate agents, financial planners and chiropractors all do well in groups like this. Also services that cater to small business owners. If you're selling to corporate clients, leads groups can work as long as you have similar participants who also have corporate clients.

Myth – Chambers of commerce are just for big companies.

Fact – The people who attend chambers of commerce tend to be small business owners like yourself. The great thing about many chambers is that they have many activities and opportunities to meet and mingle – committees, leads groups, breakfast and after-hours networking, mini-trade shows and workshops. The chamber can be a great community to belong to and network with.

Myth – I'm just not the networking type.

Fact – You may not be the glad-handing, hustling type, but real networking is about getting to know people, about building relationships, about helping people. The only requirements are that you be professional about what you do and be willing to contribute to others.

Myth – I don't have time or energy to keep in touch with all the people I meet through networking.

Fact – Keeping in touch doesn't mean you need to call everyone all the time. Ask people if they'd like to be on your mailing list or eZine list. This way you can keep in touch with many people with minimal effort or time.

Myth – Everyone is selling, nobody is buying.

Fact – It may seem that way in your first meetings, but as you get to know people you'll start getting business and referrals.

Listen, if networking was a complete waste of time, nobody would do it.

When I started my business, I didn't have much going for me except enthusiasm. I had a home office and didn't even own a typewriter (let alone a computer). But I had read several marketing books and networking was at the top of the list in many of them. I started calling around to find what networking groups I could join.

I found one in Marin county, north of San Francisco where I lived, and learned that they wanted to start a chapter in San Francisco. I volunteered and even got hired to do their newsletter for a nominal fee. So not only did I get networking experience, I got experience running and promoting meetings and designing a newsletter (on my new Mac Plus computer). These skills still serve me today. And I made contacts and clients who I still know to this day over 18 years later!

To be successful at networking you need to jump in and get involved.

Later in my career I started networking at IMC – the Institute of Management Consultants. This was a great place for several reasons. Not only did I learn a lot about consulting, but most of the participants were good prospective clients. I served on committees, did presentations and invited clients as guests. One session, during the dinner meeting, I looked around at all the tables and realized that at every table of eight there were one or two of my clients. Now if that isn't effective networking, I don't know what is!

Different types of networking groups

There are many different types of networking groups you can get involved with. Here are some of the most common ones:

1. **Chambers of Commerce** – Mostly populated by small business owners like yourself. Most have regular meetings and seminars. The key to success here is involvement and visibility and going for the long term. Showing up for a few after-hours networking sessions won't do much for you.
2. **Professional Groups in your field** – Your peers can often be a great source of referrals – especially if you have clearly differentiated your businesses. If your Core Marketing Message stands out, you are likely to receive referrals from people who do similar but not overlapping work.
3. **Professional Groups outside your field** – I've seen this work very well for some people. For instance, a financial planner might frequent construction industry gatherings and become known as the financial person to the construction industry. There will usually be very little competition for your services in a group like this.
4. **Leads or Networking Group** – These groups typically meet weekly early in the morning. They consist of several business owners who are all in noncompetitive businesses. These groups can either be great or a flop. It all depends on the makeup of the group. If you sell personal services like real estate or chiropractic, these groups can be great. But if you sell to large corporations, the membership also needs to sell to the same kinds of corporations or you'll never get any leads.
5. **Start your Own Group** – Maybe this is the only way to bring together like-minded people and start actively networking. Perhaps start with a breakfast meeting held monthly. Get to know each other and grow the group slowly with the right kind of people. Encourage participation. Give presentations about your business. Hold co-events for your clients. The possibilities are endless.

Personally, I've had many experiences with networking, some good, some not-so good. Two I'd like to mention stand in stark contrast.

Several years ago I helped form a small business group that we called the Consultants Group. It consisted of six to eight people and we met once a month for lunch. We discussed our business, brainstormed problems and offered support and ideas to each other. We had a good time and we all got value. The group continued for about two years. Several years later, I'm still in touch with some of the members of this group. I've received some referrals and I'm even working with one as a client. This group had no formal structure, no mailing list, no nothing except a clear theme. In short, it worked and we all got value from our participation.

When I moved to Palo Alto, south of San Francisco, several years ago, I decided to start my own networking group. I got together with an associate and we modeled it after a leads-type group with a focus on consultants and other professional services as members. We met twice a month for breakfast. I did a lot of work in structuring the group, creating systems, drawing up marketing plans and even intended to make it a for-profit venture. Well, it fell flat on its face. I couldn't get anyone to pay. People showed up for a first meeting or two but never came to another one. I called it quits after a couple of months.

Does this mean that an unstructured, informal group is better than a structured formal one? Not necessarily. But it was clear that if I was going to start another group, I had better go the informal route. I just didn't have the time and energy to start a whole new entity. If you're going to start a group or even join one, you need to find a format that works for you.

Getting involved in networking groups

There are many, many things you can do to improve your networking effectiveness. Here are some of the more important ones.

1. **Check out several groups** – think of it as "dating" and keep going to different groups until you find a group that resonates with you. Don't just impulsively join the first group you hear about. Conversely, don't just go to a group one time and write it off because you didn't get any leads.

2. **Join a group** – whether it's a professional association, chamber of commerce or networking group, and attend regularly. Make attendance at this group's functions a regular part of doing business. Don't think of it as optional any more than doing your books is optional. I promise that after awhile you'll get to like these people and look forward to attending. They'll become not only a source of clients and referrals but a support group that helps you combat the isolation of working alone.

3. **Get involved in the association** and make it a point to meet as many people as possible. Eventually take on leadership positions in the group. As a leader you'll get more visibility. You'll have more credibility. It's a chance to strut your stuff and show people what you can do. Be careful that your involvement in the group is not so all-consuming that it seriously cuts into time you need to be spending on your business.

4. **Take time for more face-to-face time with associates** – such as breakfast or lunch meetings. These can be much more powerful than meeting in only a group setting. I've had lunches with people I've met through networking that have turned into new clients without me even trying. I've met with people who have left with 3 or 4 referrals from me. See the group meetings as the launching pad for creating more in-depth business relationship. One-to-one meetings is the way to do this. See below for more details on this important strategy.

5. **Keep your associates informed about what you are doing** in your business through mailings, invitations and calls. Take every advantage you can as a member of your group. When you join, send everyone a letter, telling what you do. Ask people if they'd like to be on your email list. Invite them to workshops or introductory talks. As an InfoGuru, you have leverage that many others don't and, by keeping your group informed, you gain even more leverage. You become a big fish in a small pond.

6. **Give referrals yourself.** Keep your networking associates in mind and attempt to give them referrals. One of the sweetest phrases anyone can hear is "How would I know if someone was a potential client for you?" Then keep your eyes and ears open for that kind of person. Try your best to be a connector. This builds your status and reputation and people are likely to respond in kind.

7. **Go for quality, not quantity.** Develop deeper relationships with key people. Every organization has its movers and shakers. Take time to get to know them. Take them to lunch. Meet them at your/their office. Movers and shakers are people of action. Building your relationships with these people can translate into more business.

8. **Be patient and persistent.** It can take awhile to build relationships that turn into clients. The investment of time and effort is certainly worth it. Successful networkers don't belong to a lot of groups. They build depth in the few they belong to. They're loyal. They're consistent. And as a result they get a lot of business.

Sending Something

One of the best ways to leverage results from networking is by sending things to your networking contacts. One way is to simply send an article that you've written after meeting someone. See the section on writing articles in Chapter 12. But there are a lot of other things you can send. In fact, I recommend the "Send Something" strategy as the very best way to get attention and to gain credibility through networking.

Invitations

Invite your contacts to events and workshops. In the past I have put on workshops that introduced participants to my services by sharing valuable marketing ideas. I've also hosted other people who had offerings I thought my clients would be interested in knowing about. Even for the people that don't come, your name gets out there through the invitation.

Client Profile Sheet

One of the best pieces of marketing material is a Client Profile Sheet. It doesn't talk about you but about those you serve. Explain exactly who an ideal client is for you. When your contact meets someone who fits the profile, they'll think of you first: "Oh, Marcie works with people just like you!"

Vacation Postcards

Before you go on vacation, compile a list of your most important clients and business associates. Every day write a few postcards. It's fun, easy to do, and the kind of thing people will remember for years. (They'll probably even stick it up on their refrigerator.)

Feedback and Compliments

People like it when you notice something about their business. If you make a good connection at a networking event, send them a note afterwards giving them a compliment or positive feedback on some aspect of their business such as their web site (which you checked out the following day).

Time-Sensitive Information

If you notice an event in the newspaper that you feel some people in your network might be interested in, drop them a quick note by email. Even if they don't go, they'll appreciate your thoughtfulness.

Ads or Publicity

When you come across an advertisement or a mention of a client or associate in the paper, clip the ad or article and send it with a complimentary note. They'll be glad you noticed and will remember you for it.

Articles by Others

It's always good if you can write your own articles, of course, but if you come across a good article by another in a magazine or a journal, cut it out or duplicate it and send it along with your own comments to select contacts.

Moving Notice

If you move, let your contacts know with a card in the mail. But don't make it a boring, generic change-of-address card. Use it as an opportunity to indicate that your business is growing or moving in exciting new directions.

Special Occasion Cards

Many Independent Professionals send Holiday cards, but they can easily get forgotten amidst the deluge of Holiday mail. Instead, send cards on other occasions. You'd never forget a card sent on Columbus Day to celebrate the "exploration of new management ideas."

Inside Information

Ever come across a new product, service or idea that's so hot that, just by sharing it, the positive association will rub off on you? Send a card or email letting your contacts know of your exciting new find.

Coffee Break

When you send a package of marketing materials or a proposal, do you worry that it will just sit on your prospect's desk? To make sure they take a minute to read it, have a cup of coffee and a bagel delivered with the proposal and invite them to take a break while they read over your material.

Book or Tape

Instead of Holiday cards, I send a copy of my favorite business book from the previous year to my top clients. It's something they'll remember for a long time, and it also makes a positive contribution to their business.

A Quiz or Questionnaire

Materials that engage your prospect are always effective. An excellent way to do this is to send them a quiz or a questionnaire. You might even have one on your web site. My online Marketing Scorecard has been filled out by thousands of people. (Check it out at www.actionplan.com/scorecard.html)

Event Calendar

Are you a speaker who has a schedule of regular speaking engagements? Send your contacts a calendar listing all your upcoming talks or events. You can also post it on your web site, and send an email with a link to the online schedule that you update regularly. Of course, this page can link to other pages on your site.

News Release

If you do a press release for a special event, make sure to include your clients and business contacts in your mailing list. Since they already know you, they're very likely to pass the news around to others.

Leads

Perhaps the thing to send that will be appreciated the most is a lead to a good prospect. But don't just send the lead suggesting your contact call. Try to facilitate the connection by letting the lead know your contact will be in touch soon.

Thank-You Notes

Don't take thank-you notes for granted. People have always and will always appreciate a thank you note. Hand written cards are best but in these days of instant communication, email thank-you notes (usually in response to some information you have received by email), are totally appropriate.

An Interesting Business Card

I created a special card to give out after talks. It includes my contact information on one side and my 5 Ps of professional service marketing on the reverse. It's a little larger than a standard business card. Interestingly, I found that when I handed it out, everyone wanted one. Soon it replaced my standard business card

I urge you to make "sending something" a cornerstone of your marketing strategy. It gets your name out there. It makes you memorable. It creates the perception of value. It's inexpensive and it takes very little time. Make it a habit.

Face-to-face meetings

Networking is so much more than the dreaded "cocktail mixer." It's really about building business relationships one person at a time.

But if you're anything like me, you don't want to waste your time. And some so-called networking meetings can be big time-wasters. I get frequent emails and calls from subscribers who want to meet with me to share some opportunity with me but won't give any details. I always pass.

If you want to sell to someone or, on the other hand, want some direct help, be up front about it. I don't want a networking meeting to turn into a sales pitch or a one-sided brain-picking session. Ideally, a networking meeting is a win-win exchange of information, ideas and resources.

So when you approach someone for a face-to-face networking meeting, make sure your intentions are clear, and you'll probably get the meeting. Here are some of the reasons for such a meeting. I'll follow the reason with a sample script.

A Common Interest

"I heard that you were a great jazz fan. I am as well. I actually created a management model that's based on jazz improvisation. I know you love business models. How would you like to get together and share some ideas on developing models?"

Trading Ideas

"I just learned a new way to get ranked higher in the major search engines. I'd love to share it with you if you'd be willing to give me a few tips on headlines for web pages."

Sharing Information

"I know you're a member of the Palo Alto Chamber of Commerce. I'm looking at joining and wanted to know how its worked for you. Could we discuss it over lunch?"

Sharing Successes

"I recently did a project at Hewlett Packard that was very successful and I knew you'd want to know about it. It will give you some new ideas on project management."

Building Your Referral List

"When we met at IMC last week I really wanted to learn more about what you do. Your approach sounds unique and I'm often asked for referrals to people like you. Why don't we get together for coffee?"

Brainstorming

"Since I told you about the InfoGuru Marketing Manual and you got it for yourself, I've wanted to meet with someone to brainstorm how to put some of its ideas into action." (I hear about this all the time!)

Mutual Support
"Something I'm really stuck on is managing my books. I know something you have difficulty with is your computer system. Why don't we get together and trade our best tips?"

Masterminding
"I'm committed to expanding my business by selling more products on the Internet and I know you are as well. Since we're both into marketing, let's create an Internet marketing mastermind group and learn from each other."

Just Catching Up
"Gosh, we haven't talked for some time. I'd love to get together with you and catch up on what you've been doing."

Brain Picking (the direct approach)
"John says you're one of the best networking people in Silicon Valley. He also said you'd probably be willing to share a few of your secrets if I took you out to lunch."

All of these reasons are a little different and somewhat the same. They're all about sharing ideas, resources, and expertise. Sometimes you're offering more, sometimes asking for more. Often it's an even trade.

In all cases you're going to get around to talking about what you're up to. You want to make sure to share a success or two and ask for some in return. You'll be more likely to remember each other when a need for your respective talents comes up in the course of everyday business.

If you make it an aim to meet fifty new people a year like this, can you imagine the marketing impact it might have? All of those people are in overlapping networks. You'd start to create "Marketing Synergy" where everyone starts hearing about you and talking about you.

More ways to set up meetings

Let's look at several ways to set up meetings either one-on-one or in small groups. Think of yourself as someone who facilitates networking. People are happy to get together if you just provide the right conditions.

1. **Interview potential clients and contacts for an article or report you're writing.** They'll be flattered and will also learn more about you without you pitching your services. Send the article to them all with a personal note once it's published.
2. **Invite a small group of clients and associates for a lunch at your office.** They'll enjoy meeting together and, because you may offer somewhat different services to each client, they'll end up cross-promoting those services to each other.
3. **Enjoy jazz, the theater or baseball?** Buy two tickets to a season of events and invite a different contact each time – sometimes a client, sometimes an associate. It's a fun, low-pressure way to build business relationships.

4. **Going to your professional convention this year?** Why not contact an associate who's also going and arrange to fly together? You'll have a lot of time to catch up and since you have to fly anyway, your time will be well spent.
5. **A great place to deepen your relationship with someone you recently met** at your monthly professional association is at the next meeting. Call them and ask to save you a seat at dinner so you can explore your common interests in more depth.
6. **Host an associate/client dinner.** Have three or four of your associates, who all do somewhat different work, invite one of their clients to an informal dinner at your home. Each of the invited clients is a potential client for you as well as for each of your associates.
7. **Arrange for a brainstorming group for contacts and clients.** Let them know you're testing some new ideas and you'd like their feedback. By the time it's over, everyone will know more about what you're doing.
8. **Give away some of your time for free.** When I sell my Client Magnet tape set, buyers get a free half-hour consultation with me by phone. Some of those meetings turn into long-term clients.
9. **Want to keep seeing a contact?** Invite them to your professional association and suggest they join. Once when I belonged to IMC (Institute of Management Consultants), I looked around the room at dinner and realized that there were two or three of my clients at every table. That's networking leverage!
10. **Give thanks for a referral** by taking your contact out to lunch: "I appreciate you spreading the word about my business. I'd like to thank you by taking you to lunch next week."

I want you to understand that getting together with people does not have to be a struggle. If you provide a legitimate reason or set up a favorable situation, people will be eager to meet with you. And the more meetings, the more visibility and credibility you'll have.

Action Plan - Networking

Create a networking plan by taking the following action steps:

1. Find some networking groups and then get involved in a few.
2. Develop various materials to distribute to networking contacts.
3. Regularly set up face-to-face meeting with networking contacts.
4. Learn more about the strategies of networking from the books below.

Like all marketing activities, you get better at networking if you just get out there and do it! The more people you meet, the more relationships you build, the more people know you, like you and trust you. For many professional service businesses, marketing is their primary marketing activity. It should be a central part of your marketing as well.

Books on Networking and Referrals

Nonstop Networking – Andrea Nierenberg

Endless Referrals – Bob Burg

The Secrets of Savvy Networking – Susan Ro Ann

Dig Your Well Before You're Thirsty – Harvey MacKay

Secrets of Power Networking – Sandy Vilas

These and other books can be found online in the Action Plan Marketing Bookstore.

Also get the free report on networking by Will Kintish in our Goodies Section of the manual.

Notes

Chapter 11

Speaking and Writing – Topics, Titles and Headlines

Sharing What You Know

As an InfoGuru, you're paid for what you know or for applying what you know. People "pick our brains" and "get inside our heads" to learn how they can improve their businesses. So what you know is valuable. It's what your clients pay you for.

But what you may not realize is that using the same knowledge that clients pay for is one of the very best ways to magnetize new clients. This is at the very heart of InfoGuru Marketing.

Unfortunately, many professionals are very reluctant to share this information. They are afraid to give away what they usually get paid for. But this thinking is very shortsighted and actually hurts you more than it helps.

For one, many people are never going to use your services no matter how much information you give them. If you tell them very little, they won't use you. If you give away the store they won't use you. But those who are seriously looking for help and need the knowledge you have to offer will be very grateful to get a free sample of what you know. When they are ready to work with you, they'll call.

Now I'm not talking about sitting down with every potential client you meet and explaining every single professional secret you possess for free, hoping these meetings will turn into new clients. They probably won't. But you can share your expertise in a very cost-effective way that demonstrates your expertise and builds your credibility with your potential clients through speaking and writing.

Speaking and Writing are the Best Promotional Tools

In the course of a year I speak to about 1,000 people in talks at business groups and chambers of commerce. I've given several variations on pretty much the same talk for over five years. I always talk about how to attract new clients using the principles of marketing. I've gained dozens, perhaps hundreds of clients because of these talks.

> **In 1994 when I moved to Palo Alto from San Francisco, my client load started to lighten up.** Nobody wanted to travel one hour south to work with me. I had been busy setting up my office and getting settled, so I decided to turn

on my "Speaking Marketing Machine." I researched, called, sent materials and ended up getting booked for about eight talks over a three or four month period. Did it pay off? I gained 26 new clients in 26 weeks. In the next chapter I'll go into this speaking promotional strategy in detail.

Over the past few years I've written about 70 articles on marketing for service businesses. Most of them are sent out via my email newsletter, "More Clients." A few have been published in other places. These articles are starting to generate more and more calls that turn into new clients.

When I started writing my eZine I didn't know that it was impossible, so I committed to sending it out weekly! Of course it was a lot of work, but something really shifted in me and in my business in that first six months. By writing and thinking about marketing all the time, I started to generate more marketing ideas than I had in the previous several years. Writing articles was not only a good promotional strategy, it revitalized my business.

From everything I've seen, from my own experience and in working with clients, writing and speaking are the most powerful tools to develop trust and credibility with your potential audience. And there are some other important benefits to writing and speaking – benefits that can dramatically help your business. They include:

- **Increased confidence** – If you've taken the time to prepare a talk or write an article, you've had to think through your ideas step-by-step. You become more focused and your ideas become crystal clear. You can use that confidence when speaking with a potential client about your services.
- **Increased professionalism** – By writing and speaking you tend to get better at what you do. You express yourself more clearly. You come to the point more quickly. You are more definite about what you can do.
- **Increased Income Potential** – Articles can be sold. Talks can be paid for. It's amazing to me that two of the things I enjoy doing most are often valued so highly that people will pay for them. I recently wrote several 1,500 word articles that paid me $1,000 each.
- **Transition to Bigger Things** – Talks can lead to workshops that pay even more money and articles can lead to books. There is no guarantee of this but people who are now successful with a full-day workshop probably started with a one-hour talk. And most of those who wrote and published a book started by writing several articles first. (Even Stephen King wrote hundreds of short stories before his first novel was published.)

It All Starts With Titles and Topics

In these two chapters we're going to explore two areas: 1) How to develop the topics, titles and headlines of talks and articles and **2)** How to successfully develop articles and talks and how to use them successfully to promote yourself.

Thankfully, both articles and talks can be about exactly the same subject. And in fact articles can lead to talks and talks can lead to articles. So at first, don't worry about which you'll do first. Just start with topics and titles.

This is another of those places where I can't emphasize enough how important this is. Everything starts with topics and titles. They are not only used for talks and articles but for web sites and brochures, as subheads and as names for services and products.

Your objective in an article or a talk is to share some useful information that can help people solve a problem or improve their condition somehow. A talk or an article can't usually transform a business, but it can be very useful. It can make a difference. So all articles and talks need to be prepared with this in mind. You're not trying to prove how smart you are, you're trying to help someone.

Good titles need to indicate immediately that the article will be useful to the reader or that the talk will contain valuable information. If not, no one will attend and no one will read.

Coming up with good topics

Here you're not worried about wording, just about the topic itself. What do you know about that your prospective clients might find useful? What secrets, tips, how-tos or inside information do you have that others need? What solutions have you found to problems and predicaments that your clients have experienced?

Some possible business topics

1. Improving communication amongst staff members
2. Increasing overall productivity
3. Process improvement strategies
4. Improving employee retention
5. Dealing with difficult change
6. Managing a diverse workforce
7. Running better meetings
8. Reducing employee conflicts
9. Better time management

Action Plan

1. **Start making a list of topics that fit your business.** Say you're a management consultant who has worked in a wide range of business areas. You might have information about the following: effectively managing staff, time management, employee retention strategies, hiring techniques, etc. Try to come up with at least a dozen topics.
2. **Now prioritize your list.** Which areas do you find most interesting? Which is most beneficial to your clients? Which do you know more about than the average management consultant? You now have an initial list of topics.

But how do you turn those topics into titles? Good question!

Rules for Writing Good Titles

Whenever you're writing a title you should try to incorporate all four of the elements below. If you do, it will usually be a good title that will attract the attention and interest you want.

1. Clear and easy to understand
2. Targets the audience
3. Includes core benefits (self-interest)
4. Leads the reader into the copy

One of our topics was time management, so let's use that one. We want to create a compelling title for a talk or article on "Time Management."

1. Clarity

"Time Management Techniques." This is quite clear. I know the talk or article is about techniques of time management. If that is a concern to me I might read further. However, this title is pretty general, isn't it? Time management techniques for whom, and what do I get? It might be easy to pass over this title because, although it's clear, there's not much in it for me. Your readers aren't mind readers. And they won't often take the time to find out more.

So now let's target the audience:

2. Target

"Time Management Techniques for Managers." Now this is better because, if I'm a manager, I know they are talking about me and I'm much more likely to respond. People love things that are designed for them. The more specific the better. Technical managers, medical managers, academic managers. If you can get more specific, do so. You'll get more attention and readership immediately. But still there is no compelling benefit.

So let's add one:

3. Benefits

"Managers, Save Two Hours Per Day With Better Time Management." Now this is even better because I've told the manager a tangible benefit that comes from time management. If this is a benefit I want, I'm more likely to read further. Now we're cooking! You simply need to think of what benefits those managers are looking for. It might be: reducing stress, increasing productivity or decreasing attrition. Sometimes you might actually list more than one benefit in the title. But to make this title even more compelling and literally force the reader to read the copy below the headline, you need to do one more thing.

Let's turn it into a story:

4. Lead the reader

"How 20 Managers Save 2 Hours a Day With These Time Management Techniques." Now I'm really interested. It's been transformed from a fairly flat heading

into a story with some drama. Do you see how a manager would find it hard not to read the copy under this title? They want to learn what all those other managers did. It sounds more believable, more interesting. And that's with just 13 simple words.

Other Secrets for Compelling Titles

These are titling techniques that work in almost any kind of situation.

How-to titles

Some of the best selling books of all times have started with the words "how to." And this goes for titles of talks and articles. The final title we came up with was a how-to title. Just start the title with the words "How to" or "How (target audience), followed by a benefit. "How technical managers are reducing attrition and keeping better employees"

X# of ways titles

This is similar but by using a specific number, you point towards a system or process that's easy to master: "Ten ways medical administrators are succeeding in managing diversity." – "Five secrets for improving your sex life."

Contrarian Titles

I like these because they are often tongue in cheek. Once I wrote an article titled: "Ten ways NOT to attract new clients." People like this kind of stuff because they know it's going to be a little humorous and entertaining.

Fun titles

This uses some of the techniques listed above but you put in an interesting or fun twist that demands readership. One I wrote for a client case study went like this:

> "How a writer who wouldn't network and couldn't make cold calls found all the business she needed using her Siberian Husky."

Now how can you **not** read whatever came after a title like that?

The word "these"

One of the best illustrations of a good headline was the following that appeared for over 40 years in an ad for a correspondence course: **"Do you Make These Mistakes in English?"** Tested many times, they discovered that the word that made the most difference in getting people to read the copy was the word "these." Surprised?

The word "these" points to something in the copy. It makes you want to know what they're talking about. Do you see how it loses its punch if you take out "these?" – "Do You Make Mistakes in English?" That statement can be answered by a yes or a no. No reading required! So if you use a question, make sure it can't be answered by yes or no but draws them into the copy to find out more.

Story titles

The famous John Caples ad: "They Laughed when I Sat Down at the Piano... but when I began to Play..." This has been used in various incarnations over the years and

can be adapted to many situations. Again, you're setting up a story: "They laughed when I called myself an InfoGuru... but when the dollars started rolling in..."

If you want to jump into this even more deeply, get John Caples book below. You'll understand titles and headlines better than 99% of your competition.

Improving titles and headlines

Unlike a major direct mail marketing company, you don't have the luxury of doing a split run test on a headline to see which one pulls the best. Research has shown that one title or headline can outperform another by 10% – 50% – even 500%. But you can work on refining your title before you publish your article or promote your talk.

First, after writing your title, subject it to the 4-way test above – clarity, target, benefit and lead-in. Then work at tightening it up. Try different words. Make it shorter. Keep it simple. Avoid long words. Make it emotional.

Then read it out loud. Is it clear? Is it trying to be too clever? Clever titles or the use of puns or double meanings will usually get you in trouble.

Once you've got it as far as you can go with it, run it past some friends and see what their reaction is. Remember, you want to notice reactions, not opinions. They may have the opinion that it's too long. But the reaction might be that they'd like to read the article.

Then do some final fine tuning, if necessary and you're ready for prime time. Someone once said that if you write an ad and you have ten hours, spend nine hours on the headline! It's that important. Remember, if no one reads your article or comes to your presentation, it matters little how good the article or presentation was.

Action Plan – Speaking and Writing

1. **This week look at headlines** – in newspapers, magazines, billboards, etc. Notice what draws your attention. Notice what gets you to read the copy under the headline.
2. Sit down and write a dozen or more titles for your InfoGuru business using the guidelines above.

Books on Titles and Headlines

Tested Advertising Methods – John Caples

Rapid Response Advertising – Geoff Ayling

Cash Copy – Jeffrey Lant

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 12

Speaking and Writing to Promote Yourself

Once you've developed titles and topics for talks and articles there are two more important steps.

1) Actually writing the talk or article
2) Using the talk or article to promote yourself.

That's what we'll be covering in this chapter.

Write a Talk or Article in 90 Minutes

Ever hear someone say, "I've been working on an article for a few months"? Well an article or talk doesn't take a few months, it should only take about 90 minutes. Now it may take some editing and fine tuning, but the writing from beginning to end should be a very quick process.

How? Very simple. Use an outline and fill it in.

You now have your title. You have an idea, a target audience, a benefit and a reason for your audience to want to know more. That's more than most people start with. Next create a simple outline that gives some structure to the article or talk. Here's a generic example:

1. **Problem** – Discussion of a common management problem.
2. **Solution** – What can be done to solve this problem.
3. **Examples** – What others have done.
4. **Wrap up** – A few important points to remember.

That was easy. OK, now go back and add some sub-topics

1. **Problem – Discussion of a common management problem.**

   Scope of the problem

   Some typical examples

   What it costs businesses

   The root of the problem

2. **Solution – What can be done to solve this problem?**
   Where you need to start
   What you must take into consideration
   Avoiding common pitfalls
   Five ways that are proven to work
3. **Examples – What others have done.**
   A case study of a few businesses who solved this problem
   Their situation, what they did and the results
4. **Wrap up – A few important points to remember**
   Reiterate the main points
   Emphasize why this is important

OK, now this has taken all of five or ten minutes.

Next, go over the outline a few more times. Don't worry about getting it right, you're simply "chunking ideas" here and arranging them in a logical order. Once you feel you have a decent outline that makes sense, start the writing – one word, one sentence, one paragraph, one section at a time.

Now I also advocate taking some time to mull about this for awhile before you start writing. I often give it a day or two. I don't worry about writing it. I just say to myself, "I need to write about so and so. What am I going to say?" Ideas start popping into my head without much effort. When I sit down to write, I usually do it without a pause from beginning to end.

Don't worry about writing perfectly. Don't worry about writing grammatically. Don't worry about writing with style. Just get your ideas out of your head and into the word processor. When you've completed your first draft then you can start to fine tune and work on grammar, style and the finer points. Sometimes it's a good idea to get an outside person to give you some feedback and do some editing for you.

Give your internal editor a break. One of the biggest things that stops people from writing quickly is their "internal editor." You know, when you write a sentence or two he says, "No, I don't like the way that sounds. That's just not it." So you go back and write it again. And again the editor says. "No, that's not perfect, yet, try again." Give this internal editor some time off and just write. Write fast. Don't stop until you have a complete first draft.

Action Plan

Write a short article using the guidelines above.

Some questions and answers about articles

Q – How long should my article be?

A – This is a bit like asking how long a string should be. It depends. If you are writing the article for your eZine it may be just a page or two long. If you're writing for a

prestigious journal it might be 1500 to 3000 words. Later we'll talk about how to structure the exact format of your article before you write for publication.

Q – Does the article need case studies, examples or stories?

A – These are always good to include in articles because they lend more credibility, but they are not absolutely necessary, especially for shorter articles.

Q – How important is literary style, grammar, etc.?

A – Following the basic rules of grammar is important but not usually a problem for most people. An editor can clean this up quickly. Style is another matter. I try to write as if I'm talking to a person one-to-one, explaining how things work. I'm not thinking about style. I'm thinking about communication.

Q – What can help me be a better writer?

A – Pick up a copy of "the Elements of Style" – a writer's companion for years. Also, the more you write, the better you'll get. Practice, practice.

Preparing for a Talk

You can use the same approach to write articles and talks but your final result may be somewhat different. The article is prose that people will read word-for-word. So you may want to spend a little more time polishing your prose and getting editing help if needed.

A talk is somewhat different than an article in that it can be more in outline form. Perhaps you want to prepare overheads for the talk (which we won't get into here), but most importantly, you need to prepare for the talk by practicing it out loud. Yes, out loud. Nothing else is a substitute.

Some people tape their talks and then listen to them. Some practice out loud in front of a mirror. Some practice with their spouse (poor spouse) and some practice in odd places like the bathroom or while driving. But however you do it, practice you must.

I personally practice by standing behind my desk with my notes lying on the desk in front of me. I must admit, I practice a lot less than I did than when I started to give talks but, whenever I develop new material, I usually take an hour or two to actually deliver it out loud. This helps me fine tune, anticipate questions and audience participation and to add some humor. I like to be very spontaneous in my talks so I don't memorize them. I use my notes or overheads extensively but I try to read as little as possible.

Never read a talk from beginning to end. This is death for a speaker!

There have been many good books written on speaking and giving talks. Toastmasters is an organization dedicated to helping speakers give better talks and National Speaker's Association supports professional speakers. If you plan to give talks you may choose to take advantage of some or all of these resources.

But for heaven's sake don't spend 3 years in preparation before you go out and give a talk! If you have helped clients solve problems, if you can write, if you

can speak, you can give a talk. It might not be great the first time but after several times you'll almost certainly get good at it.

Again this is an area that you must not skip over lightly. Giving talks is the heart of promotion for an InfoGuru. It is something you MUST do. It will propel your business in directions you can't imagine. Yes, you can succeed without it but why try? You're an InfoGuru. You have information, knowledge, wisdom to share and this is the way to do it.

Some questions and answers about talks

Q – Should I use overheads, PowerPoint and handouts in my talks?

A – These are fine but they must not distract from your message. Often they are used as a crutch. Get your talk down as best you can so that you feel comfortable with the information, then handouts and overheads won't get in the way.

Q – How can I overcome my fear of speaking?

A – It sometimes simply takes some practice but a good thing to do just before the talk is to breathe deeply and stretch. Get the tension out of your body. Also be crystal clear what your opening lines are going to be. Have a real problem? Get help from a speaking coach, a hypnotherapist or NLP practitioner.

Q – How can I become a better speaker?

A – Toastmasters is a great organization to learn the craft. You can find chapters everywhere – even around the world. If you're really having problems and need to get better quickly, hire a speaking or presentation coach. It will be well worth the investment.

Q – How do I get cards after a talk?

A – Getting the talk is the first step. The second is giving the talk. But the most important may be the follow up. And you can't follow-up if you don't have contact information. Don't assume that if you give a great talk people will "rush the podium," cards in hand, begging you to call them. I've never seen it happen. You need to set it up so that people eagerly give you their cards. The simplest way to do this is to offer a free report or subscription to your eZine or newsletter after the talk. Doing a drawing for a freebie such a book or a T-Shirt also works quite well. Here's a possible script:

> "I have a detailed article on what I've spoken about today. I didn't bring enough copies but I'll be happy to send you one either by mail or email. Just take your cards out, write email or mail on the back, (make sure your information is correct), and I'll get it right out to you." This will usually result in 50% to 75% of participants giving you their cards.

If you want to take the next step and get the participants to ask you to call them after the talk, I'd suggest saying something like this:

> "I've been asked if I offer an initial consultation, and the answer is yes. If you'd like to explore how you can apply some of the ideas in today's talk to your business I'd be more than happy to spend half an hour or so with you on the phone. If

you'd like to take advantage of that, just give me your card with the words Free Consultation on the back and I'll call you within the week to set it up."

Getting Booked for talks, Getting Articles Published

OK, so now you've prepared a talk or written an article. Now what do you need to do to get booked to speak somewhere and what do you need to do to get that article published? Good questions.

The processes are very much the same for both.

Since the process for setting up a speaking engagement and getting an article published are very much the same, we'll follow the same process for each. The steps in the process are as follows:

1. Research
2. Inquiry
3. Materials
4. Mailing
5. Follow-up

1. Research for focus

You don't want to speak just anywhere, you want to speak to a group that will be receptive to your message. You don't want to publish just anywhere either, you want your potential clients to be reading the articles you write.

The best place to do this research is the good old fashioned local library. Ask the librarian if they have a publication that lists local professional or business associations. For articles you want a directory of various publications. Librarians love to find stuff. They usually have several resources of this kind in the reference section. Be ready to spend a few hours poring over names of organizations and publications. Make copies and you should emerge with a pretty good list. This is your best resource for local speaking.

For national conferences, you can search on the web. I believe the best way to do is to use Google and simply try keywords that relate to the industry you're targeting such as "conference cost accounting" or "human resources conference." You'll come up with a lot of leads very quickly. You might also want to check the online directory of associations: www.marketingsource.com/associations.

2. Inquiry for qualification

Now once you have the information you need you don't want to just mail out your packages and hope for the best. You need to make telephone calls first. You need to locate the person who can either make the decision about your talk or your article or at least be the "point person" for that decision. Sometimes things like this are decided by committees. **Call until you reach that person.**

It's very important that you make this process as personal as possible. If you're trying to book a talk or place an article (either on-or off-line), you can't do a mass mailing or mass emailing and expect to get good results. It just doesn't work that way. It makes you very easy to ignore. You need to call in person. Yes, even if you want to place an article on a web site. Find their phone number and give them a call. And don't forget to take a close look at their web site before you pick up the phone. The more you know about them, the faster you'll develop rapport.

> **If you are trying to book a talk, say something like this:** "Hi, my name is John Jones and I do talks on how managers can save two hours a day by managing their time better. I wanted to check with your organization and see if you might be interested in that topic."

They will answer no or maybe. If it's a no you might try to find out what kinds of topics they are interested in. But you just may have reached an organization that doesn't book many speakers. Thank them and move on. If they say "maybe," then that's your cue to send your "press kit."

When you are trying to get an article published, it is much the same. You try to get the editor responsible for reviewing and accepting articles and you say to them,

> "I specialize in writing articles on practical management issues such as saving two hours a day using better time management. I've seen similar articles in your publication and I wanted to know if this topic or other similar ones might be of interest to you right now."

Your purpose here is not so much to "pitch" the article but to determine interest. If they show interest they will ask you to send a query letter telling them more. They usually need to see something in print to help them determine if it fits their publication.

Remember these vital points: 1. Know something about the organization or publication before you call. 2. Talk about the value of your talk or article. 3. Remember, you are not yet trying to sell the talk or article but only determining interest so you can take the next step.

Pitching Online Articles

The process for publishing your articles online is very much the same as publishing for magazines or newspapers. You want to make the approach as personal as possible. Let me tell you how I started writing for Guru.com.

I received a notice from Guru.com by email saying that I was referred by a friend who thought I might find the site useful. It encouraged me to sign up as a Guru. I thought, "why not?" I went to the site and poked around and signed up. Then I realized that most of the people on my mailing list would probably be exactly the kind of people they were looking for. I wrote them an email telling them I had 3,000 referrals for them. This got their attention.

I got a call a few days later and I told them I'd be happy to refer the people on my mailing list to Guru.com. Todd, their "chef du content" assured me they wouldn't spam this list but just invite them one time to check out the site. Then we got around to

talking about what I did and I mentioned that I'd love to write some articles for them. He said, we'd love to have you write some articles. All I wanted was a link back to my web site in return. Not only did they agree to that, they paid me handsomely.

That first article has gotten me hundreds of visitors to my site and many subscribers to my eZine, purchasers of my tapes and this online manual as well as several clients.

What you don't want to do is a mass emailing to every site you find that has articles on it. I actually tried that. It was a dismal failure. Nothing. Instead, check out the site. Notice what makes it different, special, unique. Then give them a good ol' fashioned phone call and introduce yourself. If you can't find phone contact information on the site, you can send an email, but make it very personalized as well or offer something the way I did. I promise this strategy will pay off for you as well.

3. Materials for credibility

If you want to speak to a professional association or get your article published in a publication, you need to appear credible to that association or publication. The best way to do this is with a "marketing kit" containing a cover letter, your brochure, some case studies, samples of your writing, lists of places you've spoken, etc. Sometimes this is called the "press kit." You want to have these ready to go before you approach an association or a publication.

I'll talk about specifics for each under the next section.

4. Mailing Your materials

Booking Talks

When you send a package to the association to book a talk, make sure your materials are nicely reproduced and look professional in every way.

What I include in my kit is:

- Cover letter which includes reason for talk, a testimonial and a call to action
- A one-pager that includes a concise talk write-up and a personal bio
- A page of places I've spoken
- A page of comments from people who have attended talks
- A copy of my marketing materials
- A cassette tape of a previous talk

Now you might not have all these materials, but do the best you can. The most important is the cover letter and the one-pager that they can use as-is in their announcement for your talk. You want to make it simple for them.

To see examples of these materials go to the Appendix.

Publishing Articles

For your query letter to a publication you can send fewer materials:

- Query letter
- Samples of your writing or published articles

The letter itself is the most important because it explains the reasons why your article will be appropriate for their publication. Build your case as strongly as possible. Talk about trends in business, give examples of people who have used these ideas, cite other experts, explain why their readers will appreciate it, etc. Don't over-hype, but don't undersell either.

For a copy of a sample query letter, go to the Appendix.

5. Follow-up and wait

What I've found is that your initial call and your materials really need to sell you. If you didn't establish rapport, if you didn't send quality materials, then you haven't got a chance. But if the materials are quality, you have as good a chance as anyone else trying to book a talk or get an article published.

So when you follow up you want to be fairly low key: "Hi, this is John Jones, I sent you the materials on the talk/article on time management and wanted to know if you received it and if you have any questions."

If they have questions, answer them succinctly. But don't try to do a sales job. If they are interested, they'll let you know. Often they'll say something like: "Our association/publication is looking at several possibilities right now. I'd say your talk/article has a good chance but I can't promise anything right now. Our committee/team is meeting in a couple weeks to set the schedule/editorial calendar and we'll let you know then."

So you should do two things. Sit tight and wait and start working on the next talk and the next article. My mentor Alan Weiss says he always has 3 or 4 articles in circulation at any given time. That's a great strategy because he doesn't put all his eggs into one basket. As one article is accepted, he's working at getting the next one out. By the way, Alan has written over 400 articles in his ten or eleven years in business and he writes every morning.

He also makes a million dollars a year. He maintains that writing has a lot to do with it.

Become an InfoGuru

You can't expect to make great headway in your marketing and your business if you only write an article or two and give a talk here and there. Your object is to become known as an expert "outstanding in your field," and that only comes with lots of exposure through talks and writing.

Keep your eyes open and your ears to the ground, looking for opportunities to give talks and write articles. You can start with a local organization that you're a member of. If they know and like you there's a good chance you can give a talk or put an article in their newsletter.

Perhaps you'll see an article in a publication and it rings a bell. Call the publication right away and pitch your idea. Often your enthusiasm will win them over. There are opportunities everywhere. After all, associations need speakers every month. Why not you? Publications need to fill their space with articles. Why not yours?

Use articles in networking. An article can be one of the very best tools to leverage your networking effectiveness. First, prepare a good "Core Issue Article," one that gives a good sense of the solutions you provide. This should be an article that you could literally use for years. When you meet someone in networking use the article as the reason for a follow-up: "I have an article on more effective management that I think you'd like. Can I send you a copy?" They'll usually say yes. Then say. "I'll send you a copy tomorrow. Then perhaps we can talk about this topic a bit more." This give you a reason to give a follow-up call: "I wanted to know if you thought those management ideas would apply to your business...."

Have fun. You want to be persistent in getting out there but you needn't be so methodical that it turns into a dreaded chore. If you make it a game and play to win, you're bound to gain a touch of fame.

Information Products

It's very important to remember that information products are an outgrowth of giving talks and publishing articles.

- A talk can be taped and turned into a cassette tape you sell at subsequent talks or on your web site.
- Several talks can be put together and be organized as a paid workshop.
- A workshop can be taped and put into a complete tape album.
- Articles can be bound together into a report or even a book or e-book.
- An eZine article can be expanded and sold to a magazine or online web site.
- Your articles can turn into a column in a local paper.

All of these not only add to your status as an InfoGuru and end up attracting more clients, but also start generating an income stream of their own. InfoGuru Alan Weiss makes $100,000 per year on his information products alone! I've done many of the above and so have my clients. But it all starts with talks and articles. They are the foundation of the InfoGuru Marketing Principle.

For much more detailed information on creating information products I suggest you check out "Make Your Knowledge Sell" by Monique Harris. It's a comprehensive guide that gives you action plans for everything you need to know. Just go to the Site Sell web site to learn more.

It's very important to remember that information products are an outgrowth of giving talks and publishing articles.

Now here's a few more ideas on how to use articles and talks to market your services.

Using articles to get appointments with qualified prospects

Geoffrey Bellman wrote a book on consulting called "The Consultants Calling." In a chapter on marketing he outlined what I consider to be one of the

most brilliant examples of InfoGuru Marketing ever. It fits all the criteria: He used information to get attention and leverage. He used repetition to build trust. He didn't oversell but makes a point to build relationships first. Here's a summary of the process he used.

1. **Research your market – assemble names – 20 to 40**

First you need to determine specifically who you'd like to approach. Bellman focused on HR managers in the new city he'd moved to. You may go after IT managers or CFOs. A good place to start may be your local Business Journal's "Book of Lists" that's published each year with a listing of the top companies in your area in all industries.

You need to call first just to determine who the right person is to send your mailings to. You don't want to talk to your target prospect, just get all the pertinent data, address, proper title, etc.

2. **Send a handwritten note to each recipient saying you'll be sending some articles.**

Yes, hand written note. Not word processed. Hand addressed envelopes as well. Everyone opens and reads these. You do don't you? Write something like the following:

> Dear Ms Butler,
>
> I'm a marketing consultant in the Palo Alto area who's had great success in showing salespeople how they can increase their sales by what I call leveraging information. I've written a few articles on this and I'd like to send them to you. The first one will arrive next week.
>
> Many thanks,
>
> Robert Middleton

Sure, this will take you awhile to do. Don't cut corners here. Also include your business card with the note.

3. **Send articles 1 through 3 – each with a handwritten note.**

Of course, you need to have a few articles on the topic don't you? I suggest assembling the articles before you do step one. These articles don't need to have been published. They simply need to be a good example of your thinking in your particular area of expertise.

If you have articles that have been published, so much the better. Duplicate them on quality paper. These tend to get more attention. If you've been in the Harvard Business Review, it would be a shame not to leverage that article. This is one way to do it.

The articles should be word processed and laid out cleanly on good quality paper. If you need some help in formatting, any desktop publisher should be able to help you.

It is very important that these articles do not attempt to sell your services. They are to be informative and practical. They should demonstrate to your reader that you know what you're writing about. They should have many useful points that are immediately actionable.

At the top of each article, paper-clip another handwritten note:

> Dear Ms Butler,
>
> Here's the first article in a series I promised on how salespeople can leverage information to dramatically increase their sales.
>
> Many thanks,
>
> Robert Middleton

You will send out one article a week for three weeks. Realize that you only want to send as many articles in a "wave" that you can follow up on. Bellman did twenty which seems like a reasonable number.

I recommend you send your articles in a 9" X 12" envelope. Hand address the mailing label.

4. **Final letter – word processed. Hope you enjoyed the articles. Would love to meet with you to learn more about your company.**

Now your target client has received four mailings from you, the initial note and the three articles with the attached note. Now you send a more formal, word processed letter as a final mailing. It would go something like this.

> Dear Ms. Butler,
>
> I hope you have found the articles on how salespeople can leverage information to be helpful. I hope you've had the chance to implement a few of these ideas with your sales force.
>
> I would very much like the chance to meet with you and learn more about your company. I'd be interested to know the things you're doing to increase sales and manage your sales force.
>
> I'll give you a call next week to see if we can set up a meeting.
>
> Sincerely,
>
> Robert Middleton

Also include a copy of your Executive Summary with this letter and your business card.

5. **Call to set up appointments.**

Don't miss this step! Give your prospect a call to set a meeting. You'll find that it's not a cold call anymore. This person has received 5 mailings from you, including three useful articles. You have been personal and your information has been valuable. They will remember you. They will feel obligated to meet with you. You call goes something like this.

> "Hello, this is Robert Middleton from Action Plan Marketing. How are you? As I said in my letter last week, I'd love the opportunity to meet with you and learn a little more about your company."

Of course there will be some back and forth questions and answers. Your job on this call is not to sell, but to set up a meeting. You're not going there to pitch your services either, you've going to do exactly what you said – find out more about the company.

6. **When you meet, find out about them. Don't try to sell.**

Why aren't you trying to sell yet? Because you really don't know what they need. Spend time finding out about them, their needs, their challenges. Don't press to set up a presentation. I assure you that if you've done things right up to this point they'll start asking you what you might do for them. Refer to Chapter 17 on selling for more ideas on how to do this successfully.

That's it. Geoffrey Bellman found this process so successful that he met with 18 of the 20 companies he sent his mailings to. Within the next two years he consulted with six of the 20 companies. He also gained very valuable information on the market. He didn't do it again. It produced the results he wanted with just one wave of mailings.

Now go out and follow this plan yourself!

Using client appreciation events

This is a plan I learned from Ken Johnston of Achievers International to expose yourself to a wide variety of new prospects. I talk about a variation of this under Chapter 9 on Referrals, but this plan is more detailed and even more powerful.

1. **Compile a list of your clients who themselves have customers or clients.**

You may have several current and past clients, but did you ever consider that their customers also might make perfect clients for you? This is a way to approach those customers appropriately. It's a way to get a whole bunch of referrals at once and never have to cold call them. It uses the InfoGuru strategy of giving away information.

2. **Meet with your client and tell them you would like to offer a special "Client Appreciation Workshop" that you would present to their clients.**

The purpose of this event is to acknowledge their clients and thank them for doing business with you and to give them some solid ideas that could help them succeed.

Mention that the event is a triple win. One, the client wins because the customers who attend will think of the client favorably for hosting this event. They will also get exposure to new potential clients (more about that later). The customer of your client wins because they get some very useful ideas in their business. And you win as well because you are introduced to a whole new set of potential clients.

3. **Create an invitation to the event on the client's stationery.**

Also suggest they invite top managers in their company and also to invite one or two associates from outside their company. You want to make this into a special event. After all your client is giving away something valuable and bringing in a hotshot consultant or trainer (YOU) to deliver this valuable, business enhancing information. You want everyone possible to come. Some of the guests may also be good potential clients for your host client as well.

4. **Set up a way to follow-up on these invitations by phone.**

Someone in the host company should call or you should call on behalf of the host company. Don't leave out this step. It can dramatically boost attendance. Also, make sure the calls aren't made by a low-level person in the company. Someone who understands the purpose of the event and who is excited about it needs to make the calls.

5. **Send a confirmation note or email a few days before the event to build anticipation.**

People make commitments and then they forget. Reminders are appreciated. You show that you are placing a lot of value on this event. People will come excited to participate.

6. **Deliver your mini-seminar or workshop the day of the event.**

Give them your best stuff. Don't hold back. But remember, you don't want to oversell either. If the whole seminar is about how great your services are and how much you can help them, the whole thing will backfire on you.

7. **At the end of the day do some kind of evaluation.**

Ask them what they think might happen if they actually applied these ideas in their businesses. Ask them what that might mean in terms of sales or profit. Have them write all of this down. Ask them if they are committed to achieving those results. Get a show of hands. Then get business cards. Ask them if it would be OK to call them to discuss how they could get those results.

You don't need to talk about the details of your services. The seminar will give them a good taste of what you do. Sell the benefits, the results, not the service itself. If you give them good stuff they'll be more than willing to talk with you after the seminar.

8. **Call each and every one of those you received business cards from after the event.**

Get an appointment with them to discuss how you can help them accomplish their goals. Don't wait too long. A week or less is good. Call when they are still excited about what they got from the seminar. Say something like this:

> "Hello, this is Marcia Kasden. I hoped you enjoyed the seminar on reducing attrition that we gave at Y-Com earlier this week. At the end of the seminar you indicated you were interested in hearing more about how you could reduce your attrition by a minimum of 25%. We're happy to set up a meeting at no charge to discuss this in more details and learn more about your needs."

This kind of client appreciation event can be extremely effective in gaining the favorable attention of good, qualified prospects. The endorsement of your client who is hosting the event makes all the difference.

So which clients will you call to implement such a plan?

Action Plan – Speaking

Who?

Who are the people who would benefit the most from hearing you speak? What groups do they belong to? Where can you find them?

What?

What subjects are you going to cover in your talks and presentations? What do you need to do to develop a good talk? What materials will you use?

How?

How are you going to approach organizations to give talks? Do you have a list of organizations, a cover letter, a bio, a talk write-up, a list of groups you've spoken to and a page of testimonials?

When?

By when will you start? How will you fit this marketing activity into your schedule?

Action Plan – Writing

Who?

Who is the audience for the articles you write? What do they read? What publications do they get? Where can you find these publications?

What?

What are you going to write about? What are some themes or topics you can turn into interesting and valuable articles?

How?

How are you going to approach the publications with article ideas? How can you make sure you're writing what they want to publish? How can you use your article reprints?

When?

By when will you start? How will you fit this marketing activity into your schedule?

Online Resources

Articles on writing and submitting articles

www.guru.com/channel/work/guide/G5.jhtml

www.guru.com/channel/work/guide/G564.jhtml

http://www.efuse.com/Grow/email-harvesting.htm

Books on Promoting with Speaking

Marketing With Speeches and Seminars – Miriam Otte

Money Talks – Alan Weiss

Expanding Your Consulting Practice With Seminars – Herman Holtz

Secrets of Successful Speakers – Lilly Walters

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 13

Keep-in-Touch Marketing

Keep in Touch or You'll be Forgotten

Perhaps no other marketing strategy is as important as this one. Keep-in-Touch Marketing means just that – doing everything you can to stay in front of the clients, potential clients and associates who could either return to doing business with you, give you new business, or refer business to you.

If you don't stay in touch, you're invisible. And if you're invisible no one is thinking of you. And if no one is thinking of you, they certainly aren't going to do business with you!

The great thing about keep-in-touch marketing is that it can be very low-key and soft-sell. You don't have to hit people over the head with what you offer, you simply have to remind them that you're still around and have value to offer.

Imagine this scenario. You go to the local flower shop to buy a beautiful bouquet of flowers for your wife's/husband's birthday. The shopkeeper arranges and wraps the flowers and sends you on your way with a smile. You're happy, your significant other is happy and the flower shop owner is happy. Isn't American free enterprise great?

But wait a minute. Now that flower shop has a problem. They have to hope that you'll come back again. And they're not doing one thing to ensure that happens except by having their store in a convenient location. And our thoughtful flower buyer has a problem too. They might forget flowers next time a birthday or anniversary rolls around.

Keep-in-touch to the rescue. Rewind the scene. Flowers ordered, paid for and wrapped. Shopkeeper: "We have a free reminder service for special occasions. All you need to do is to fill out this card with special dates of those you'd like to send flowers to. We mail you a postcard or send you an email a few days before the date. Then you can either come in or we'll send them out for you." You: "What a great service. Does it cost anything?" Shopkeeper: "Of course not, it's the least we can do for our valuable customers." You: "Terrific. I'm going to tell my friends about this!"

That's what keep-in-touch is about. It's not about bugging your clients. It's about keeping them in the loop with information that is valuable to them. The only difference is that you're not selling flowers but your knowledge.

Keep-in-Touch Marketing gives you great leverage as an InfoGuru Marketer. After all, just sharing your information once is usually not enough (just as having a customer come in once is not enough). One talk or one article by you will soon be forgotten. But repeated information makes you not only memorable but unforgettable. It makes them come back.

Every time I do my keep-in-touch marketing I get calls, repeat business and new clients. Just recently I sent out my More Clients eZine and I got 8 orders for my tape set, a call from a potential client and a call from an old client.

So let's look at how to make a keep-in-touch campaign successful. Perhaps one of the most confusing things about this area is that there are so many things you can do that it can be overwhelming. You may need to try several strategies before one sticks. You may also need to have a large enough volume of contacts before it starts to work. But start you must.

The Message is Key – Content Strategies

Your keep-in-touch marketing can be in many formats, but no matter what the format, the content is all-important. It needs to be interesting, current and valuable to your recipients.

The following are some Content Strategies that can work.

- Tips, Techniques and Strategies
- Industry Insider Information
- Information from Other Sources
- Here's What We're Doing
- Information on a Service
- The Quirky Keep-in-Touch

Tips, Techniques and Strategies

This is the one I've always used and have found it works quite well. The principle is simple: Share ideas from your profession that can help the reader in some way. For me this is in the form of marketing ideas and strategies. For a management consultant, it would be ideas on management, etc. This strategy is particularly successful for InfoGurus. It gives the reader a sample of what you know and demonstrates your expertise. It increases your credibility. Don't worry about giving away too much. Some people will read your information and never call you no matter how much you give. But if you give too little, it may not be enough to engage a potential client. When you give a lot, your readers will think, "If he gives so much, he must really know a lot more."

Industry Insider Information

This kind of keep-in-touch content strategy is great if you know a lot about the industry you serve and that information is considered valuable by your clients and potential clients. As an environmental consultant, for instance,

information on new and pending regulations that affect your industry would likely be well-received. If you were a financial advisor, information on what is happening in the stock market or in global investment funds is going to find an appreciative audience. Note that this kind of information needs to be as current as possible.

Information from Other Sources

People often tell me they are not creative enough to come up with new material each time. So I suggest they find material from other sources and rework it. I'm not talking plagiarism but some things you can do include: Book reviews, discuss an article in a prominent industry journal, interview clients, etc. You are being more of a journalist with this strategy. The material might not be original but you can still put your spin on it and add your stamp of identity.

Here's What We're Doing

One of the most misused keep-in-touch content strategies, "here's what we're doing," often turns into nothing but news about your company that people could care less about. **What is interesting however, are stories about how you solved problems for clients written in a "case study" format.** One of my favorite keep-in-touch pieces from one of my clients is a one-page case study on the application of a certain management technique. He shares the problem, the situation, the solution and the results of using this technique. It's very simple but a great example of what he can do for his clients. Another one is an executive recruiter who simply sends out a monthly postcard mailing with news of the latest executive placed by her firm.

Information on a Service

Don't forget this one. This is your most overt marketing strategy when you implement keep-in-touch marketing. Include information about a current service or a new service. Perhaps you're offering an introductory program or have other free information. Use the techniques of Motivational Writing (chapter 15) to leverage the good will gained from your keep-in-touch marketing into some new business.

The Quirky Keep-in-Touch

I didn't know any other way to name this one. My favorite is from a writer who sends a mailing with her dog Motumbo's picture and a diary written by him! It's fun, it's quirky and it works very well. Not many people can pull this kind of thing off successfully. This writer found a creative way to link her dog to her writing skills. If you have a service that's very much like your competitor's, then you may want to find something that's tangential, but interesting. It's sure to get a smile and some positive attention.

Learn from Others

Don't create a keep-in-touch system in a vacuum. Check out who's doing what. Look at every newsletter or mailing you receive. Ask to subscribe to mailings from associates. Notice what gets your attention. Notice what bores you. Notice what you end up reading and responding to. Take the best of what you learn and adapt it to your keep-in-touch marketing.

If you find something you really like, give them a call and ask them how it's working. Be careful however. One format in one industry might not work so well in a different industry. Know your audience and what information they're looking for.

Formats for Keep-in Touch

The formats you can use are almost infinite but there are several basic formats that have withstood the test of time. They are:

- Letters
- Newsletters
- Mailers
- Postcards
- Email Newsletters or eZines

Letters

A personalized letter is a good format for several reasons. For one, it is easy to produce, taking no special design or printing. It can be personalized through mail-merge and can be sent out with relatively little preparation or coordination. Added to this, letters that are personalized are read more than the majority of things you get in the mail. The business psychologist mentioned above uses this format. His cover page is a letter and then this is followed by the one-page case study. He's been doing this successfully for about nine years.

Newsletters

What is a newsletter anyway? It can be virtually anything printed on a piece of paper and mailed on a regular basis. This is a step-up design-wise from a letter. It can be one-page on one side or two sides. It can be an 11 X 17 sheet folded once or twice. It can be a small or a large format. It can be a self-mailer or it can be put in an envelope. A newsletter's content can include any one of or a combination of the content strategies mentioned above.

For instance, here are a few samples of good newsletters

- One is a one-pager self-mailer with an excerpt from a journal, a learning fable, a list of power words, a pitch for her services and an offer for a guide on creating marketing materials.
- Another from a home builder is an 11 X 17 folded (4 pages) with an article on Feng Shui, an interview with a recent client, a column from the owner, an update on a recent house they built and some tips and tricks for remodeling.
- Three management consultants combine forces to create a nice 11 X 17 self-mailer format with an article by each one.
- A one pager from a venture capital firm uses quality printing and subtle color and includes one article and a short interview. It's mailed in a large envelope without folding.

- Still another, from a writer, is a self-mailer folded to 5-1/2 by 8-1/2 with a blurb explaining her services, a list of projects worked on in the past year and a cartoon demonstrating how she works.
- A large full-color newsletter from a management consulting firm communicates its message with bold type and fun graphics. It was initially mailed with a cover letter and fax-back form.

With newsletters, some things are extremely important. Design and quality of paper and printing are key. You want to present a professional image with everything you put out. The writing needs to be typo free (which is harder than you think, even with spell checkers) and the graphics and pictures must be appropriate to the publication. Usually the biggest mistake is to produce a newsletter yourself. Better to develop the copy and then work with a designer. If you have a basic format, the design shouldn't cost as much the second time as the first time and perhaps even less after that.

Mailers

A mailer is a cross between a brochure and a newsletter. The Mutombo mailings I mentioned above fit into that category. They are small – 5-1/2" square and mailed in a transparent vellum envelope. This can work really well for the "Quirky" category. Again, design, paper and printing a key here. It is the visual impact that makes all the difference and gets the attention of the reader. Once more, don't try this at home! You'll need a designer to put it together for you.

Postcards

This is a very flexible format and it has a lot of advantages. First, it's a quick read. You can communicate your message in only a few seconds. Second, it can have immediate visual impact. A color postcard can communicate a feeling and an identity almost immediately. Postcards also have the advantage of being relatively inexpensive. Even full-color, small-format postcards only cost 5¢ to 15¢ apiece and the postage is only 23¢ each.

- A graphic designer I know does a large format postcard (5 X 7) monthly with messages about the value of well-designed marketing materials.
- A home builder uses old reproductions of photographs with added captions to tell about their services.
- A list broker uses a small postcard with clever headlines: "We sift out your best prospects" or "Unearth your best prospects."
- An executive recruiting firm uses a large format postcard to inform people of the latest executive they've placed.

Email newsletters or eZines

You have the choice of using the mail or the Internet. And it really depends on who your clients are and what they read or don't read.

I'll cover eZine Marketing in Chapter 14.

Setting Yourself up for Keeping In Touch

It's one thing to develop a keep-in-touch content strategy and format. It's quite another to make it work month after month. There are a lot of things you need to do to make sure your mailings or e-mailings are producing the desired effect: new and repeat clients.

Build your database

The best people to send to are people you've already met. To accomplish this, you need to set up a database with names, addresses, phone numbers and email addresses. You also want to be able to sort your list easily and quickly. Many new programs now include the ability to not only compile names, but allow you to email directly from the program. FileMaker, Microsoft Outlook and Act can do this but so can a very inexpensive program: My DataBase from My Software Corporation.

Having or not having a good database can literally mean the difference between success and failure in your marketing.

Setting up and managing a database

1. **Buy a Database Program** – There are many affordable and easy-to-use database programs that you can press into service to keep track of all the people you meet. Ask around for the most popular (or most cost effective) one and install it on your computer. These take the place of your old Rolodex.
2. **Set Up the Program** – You want to make sure the program has fields which you can use to sort the database any way you want. Include the basics such as name, address, phone, email, etc. But also include "source," where that name came from. Also have a way to indicate which category this name falls into. For instance you might have Clients, Potential Clients, Professional Network, Friends, etc. This way, if you want to do a search for all potential clients with an email address, you can do it in about 2 seconds.
3. **Enter Old Data** – Go through your Rolodex, client records and that pile of business cards at the bottom of your drawer. Enter everything. You can even buy one of those cool card readers if it makes it easier for you.
4. **Enter New Data** – When you get a new client, meet a new prospect, collect cards at a networking event, enter all their data into your database. Pretty soon, you'll have a database that will be very useful in all your marketing.
5. **Sort and Utilize** – The usefulness of this database will become obvious when you do Keep-in-Touch Marketing. You can create mailing labels in an instant or export all the email addresses to your email program to send out your eZine. Perhaps you want to hold a special event just for clients. It will be a snap putting together the names and perhaps creating a mail merge letter. You'll save huge amounts of time and effort.

Your database is one of your most valuable business possessions. Safeguard it, back it up and use it often to multiply your marketing results.

Don't spam

In other words, don't mail to strangers. This is more important for email but almost as important for snail mailings. People you know are much, much more likely to respond to your mailings than strangers. Start small. It's OK. I know people who have never gone beyond 200 on their mailing list but send things regularly and get great results. Focus on building a good list.

Do it regularly

Pick the actual day you plan to mail, whether it be weekly, monthly or quarterly and put it on your calendar. Build your plan around that date. I know someone who actually printed her mailings all at once and even included the date on the mailing and then mailed them out on that date. Boy, that's organized! But plan when you are going to write, get it laid out and printed and to the mail house (which is often in your living room in front of the TV). Doing your keep-in-touch marketing should never be an emergency or a last-minute thing.

Consider it an investment

It's a bit like putting some money away every month. The value builds. Your visibility builds. Your credibility builds. The payoff is there but it usually doesn't happen instantly. Be patient. Keep working at upping the quality. Work on different ideas, formats and designs.

Some Final Thoughts on Keep in Touch

A keep-in-touch marketing strategy isn't something tangential to your business. It's at the heart of your business. You put it out there month in and month out. It's your primary vehicle for communicating with your clients and potential clients and it's the most important vehicle for establishing long-term business relationships.

> **I get calls all the time from people who say something like:** "I've been getting your More Clients eZine for over a year now. I think it's really great and has helped me a lot with my marketing. Now it's time to get some more hands-on help. What can you do for me?"

Your keep-in-touch marketing is a primary tool for making your marketing magnetic. It creates familiarity and trust. And when someone needs help, who are they going to call, a stranger or someone whose material they've been reading for a year or more?

Keep-in-touch marketing can shorten the sales cycle, sometimes pretty dramatically. Because they are familiar with you and have some level of trust when calling, they are usually ready to start working with you. Sales that once took months to close may only take days or even hours.

If there is only one promotional tool you could use, this would be it.

It's time to let go of the excuses for not doing keep-in-touch marketing and start making it a top priority. Just like investing a few dollars a month can make

you a millionaire before you retire, investing in keep-in-touch marketing can be the strategy that will make your business more successful than you can imagine.

Action Plan – Keep-in-Touch Marketing

Who?

Who are the people you need to stay in touch with? Who is most likely to do business with you, do more business with you or refer business to you?

What?

What systems will you use to keep in touch – letters, newsletters, email newsletters, postcards, clippings, invitations or simply phone calls?

How?

How are you going to develop the systems for keeping in touch? How will you generate the material that you send out? What information will you include? Will you include an offer or a call to action?

When?

By when will you start? How will you fit this marketing activity into your schedule?

Resources for Keep-in-Touch Marketing

Article by Alexandria Brown on Guru.com on Spreading the Word by Publishing an Email Newsletter.

Zairmail is a web site that enables you to do small or large run direct mailings from your computer. An excellent service if you want to use "snail mail."

Chapter 14

eZines and Email Marketing

The Future of Keep-in-Touch Marketing

I'm convinced that this is the future of keep-in-touch marketing. It has several big advantages the others don't: no printing, mailing or design costs. An eZine is the premier marketing tool for InfoGurus. All the emphasis is on good content and all the same rules apply as with regularly printed mailings. A good eZine can use all of the content strategies mentioned previously and can be anywhere from a page to several pages long.

Don't kid yourself, people do read eZines. No, not every time and no, not always the whole way through. But sending an eZine once a month is a great way to get visibility at virtually no cost. Every week (as of this writing) over 12,000 people hear from me. I assure you that it works like magic. It is perhaps the single most effective promotional tool I have ever used. And remember, I put the emphasis on giving away my knowledge. This warms up subscribers to the products and services I offer.

Here are some of the several eZines I receive:

- A five-page eZine from a Macintosh computer consultant on the advantages and disadvantages of the new G4 Mac. It had my interest. I read every word. It was thoroughly researched and well-written.
- An eZine from Alan Weiss on achieving balance in life, work and relationships. I like everything Alan writes and look forward to receiving this. I've referred dozens of people to Alan's books so this keeps me thinking of him. http://www.summitconsulting.com
- A seminar leader and trainer does a 2 or 3 page eZine with the beginning of several articles and then has a link to the remainder of the article. This is not my favorite format. I'd rather print out the whole thing and read it later instead of having to go to a web site.
- A 6-page eZine from a consulting partnership with a long article on Team Start-Up, a reference to three books on the topic, web site resources and a pitch on their services.

- A weekly, short one-page eZine from Roy Williams, the owner of an ad agency. I really enjoy this eZine because he uses insight from science, history and everyday life to make fascinating points about marketing. He's compiled his past eZines into two award-winning business books – The Wizard of Ads and Secret Formulas of the Wizards of Ads. http://www.wizardofads.com

And that's only a handful of the ones I receive. EZines have become a major source of information for my business. But is an eZine for you? Let's look.

The Case for Launching an eZine

An eZine is a multi-purpose marketing tool. For the time and effort that you invest in putting together an eZine, you are likely to get a higher overall return than any other marketing vehicle. Here's why.

Sending out an eZine is virtually free

Other than nominal listserv management charges (we'll discuss listservs in Technical and Management Issues at the bottom) it costs virtually nothing to send out an eZine to hundreds, thousands, even hundreds of thousands of people.

Compare this to the most inexpensive piece of snail mail, a postcard, which runs 22¢ per piece and 5¢ or more for printing, 5¢ or more for the label and who knows how much more for sorting, labeling, stamping and mailing. Your "inexpensive" postcard can end up costing 50¢ or more each to send out. That's $500 for 1,000.

Currently I send out almost 11,000 emails to my eZine list every single week. That's 44,000 in a month. If that was postcards, we're talking $22,000 per month in mailing costs! And again, that's just a postcard!

There's no doubt about it compared to almost any other marketing method, eZines are amazingly inexpensive.

EZines keep you in front of clients and prospects

Wouldn't it be great if your prospects and clients were thinking about you every day? If that was the case, there would be no need for marketing. A need would arise, they'd think of you and someone would invariably call. You'd have all the business you could handle.

But that's hardly the case, is it? Unfortunately for us, your clients and prospects are inundated by hundreds, no thousands of marketing messages every single day. Every car that passes you on the freeway is a marketing message. Then there are billboards, radio ads, TV ad, newspaper and magazine ads. Even our clothing has advertising on it promoting the manufacturer. Whoever thought of that one was brilliant – "Here's an ad for my company. Now pay a premium price to wear it!"

So here you are, a small professional service business owner who needs to stay in front of clients with your message so they don't forget you. EZine to the rescue. Once a month, or as often as once a week, your valuable message can land in the e-mailbox of your clients and prospects like clockwork. And it doesn't cost you a fortune. They're now thinking about you. They're talking about you. They're passing

on your eZine to friends and associates. And sooner or later they're emailing you back or picking up the phone and asking if you can help them.

Is this a fantasy? It sure isn't for me. I now get business from all over the country (and now the world) because of my eZine.

eZines are the ultimate InfoGuru marketing vehicle

Remember the main premise of InfoGuru Marketing? – Give away value. And that's exactly what you're doing when you send out your eZine. You're including valuable information, tips strategies, insights, and other good stuff your clients and customers can use. That makes you look good, the expert, successful and ahead of the trends. And that's exactly who people want to do business with.

eZine Content – What Should It Include?

The most frequent question I get about eZines is, "What should I include in my eZine? I don't know what to write about or what my clients and prospects are interested in." This is an important question, indeed. Content rules. If your content is weak, your eZine is weak, no matter how many clients and prospects get it every week. It's not that people don't read eZines, they don't read poorly written eZines with content that is not relevant. So you need to pay very serious attention to content and continuously work to make your content the best it can possible be. Let's look at some possibilities

The following are some Content Strategies that can work.

- Tips, Techniques and Strategies
- Industry Insider Information
- Information from Other Sources
- Here's What We're Doing
- Information on a Service (Promotional Content)

I've covered this topic in the previous section on Keep-in-Touch Marketing**.** Whether you send out a hard copy newsletter or an eZine, the strategies for content are pretty much the same. Below I discuss some of the other important eZine issues.

You also want to include content in the eZine that will motivate them to pick up the phone and learn more about your services. But how much of your eZine should be free information, how much should be promotion and what formats work for eZines? Let's cover that in the next section.

eZine Format – What, When and How

Although the informational content of your eZine is the most important, your eZine won't work if you don't format it in an effective way, send it out regularly and include a good balance of free information and promotion. Let's look at all of these in detail.

Balancing free content and promotion

I believe an effective eZine should contain a minimum of 2/3 to 3/4 free content and a maximum of 1/4 to 1/3 promotional content. That's a good balance. So for every two or three pages of free content, you include a page of promotional content. The promotion might be details of a service you're offering, a workshop you're holding or an online product you're offering. Remember, your eZine isn't PBS, it's NBC. You need to pay for your programming by including advertisements. And I have a pretty strong opinion that they should be advertisements about **your** services, not somebody else's.

If you sprinkle paid ads from other businesses throughout your eZine you're going to lose credibility. And you're ultimately going to lose money. Your audience wants to hear about you and from you, not from somebody selling a strategy to optimize web hits.

Every week, week in and week out, I generate from $2,500 to $3,000 in online sales from my More Clients eZine. There is no way I'm going to earn that much money from eZine ads, not even close. And I generate another $1,500 to $2,500 in professional services such as marketing mentoring and web site development. An eZine, done right, is serious business, so you need to pay close attention to your promotion. It's not an afterthought. You need to put as much time and energy in writing your page of promotion for your eZine as you do writing your content. See the section on writing Motivational Copy in Chapter 15.

Formatting the physical eZine

There are obviously many ways to format an eZine. For one, you can do it in plain text format or you can do it in html format and include graphics, color and different types and sizes of fonts. I've been doing my eZine for almost 7 years now and I'm still using plain text. Why? For one, I personally don't like html eZines. I find I don't read them. The colors distract me. The graphics irritate me by taking time to download and hijacking my email program. Also, text eZines are easier to create.

Studies I've read have said that html eZines can be more effective in some cases, but I'm still not ready to switch yet. Call me old fashioned! So I really can't tell you much about formatting html eZines. But I can share some very valuable tips on effectively formatting plain text eZines.

Make both your lines and paragraph short. There's an industry standard that suggests you do a hard return on your text at about 65 characters. This makes your text readable in virtually every email program. The lines will also be shorter than a full screen's width and therefore be easier to read. Keep your paragraphs to no longer than seven lines. Three, four and five line paragraphs are just fine.

Put spaces between paragraphs and don't indent paragraphs. This gives your eZine a cleaner look. But do indent bullet points, use dashes – and asterisks * to highlight things. You don't want your eZine to get too busy but you don't want it too flat either. Between sections use a divider of some kind. You can use dashes: ——, underlines _____, equals signs =====, or the famous tilde ~~~~~. Whatever you think looks good.

Headers and Footers. I think people overdo it a bit with eZine headers these days. It takes a page and a half before you get to the main eZine article. I do the title of my eZine on a few lines and then three lines that let people know this is sent only to subscribers and how to unsubscribe. At the bottom I include more information: contact information, info on my affiliate program, my privacy policy, my policy for using my eZine articles and info on how to unsubscribe and change subscription preferences. I suggest you look at a lot of eZines and find a format that you like and copy it.

Subject Lines. The Subject Line is important. It serves a couple purposes. If you have the same subject line every time, along with the topic of that issue, you let your subscribers know that your eZine has arrived – they don't treat it like junk mail and dump it. By adding the topic you create interest and get more people to open it as well. A typical eZine subject line might be: **More Clients – The Best eZine Strategies.**

HotLinks. One of the great things about email is that you can put in a link that will take you to a web site. This is especially useful in an eZine where you have a promotion for a particular product or service. Click and they're there. You just have to make sure your links actually link. Different email programs do this differently. And AOL is different from everyone else. If you write out the complete email address like so: http://www.actionplan.com the link will tend to highlight in blue and turn into an active link.

How often?

This is an important consideration. When I started my first eZine in 1996 I did it weekly. After about six months I went to twice a month and then for about a year I did it monthly. But when I launched my InfoGuru Marketing Manual in 2001 I realized that every time I sent out the eZine and promoted the InfoGuru manual, I sold a whole lot of copies! I decided to go back to once a week and have done so for about two years. You know this may sound like a lot of work and it is. It takes two or three hours every week to do the eZine. That includes writing, fine tuning, proofing, formatting and loading on the listserv. But I actually find writing weekly easier than monthly. I've gotten into a real groove of writing and I just set the time aside, usually on Sunday evening, and write until it's done.

For most Independent Professionals I recommend that they do a monthly eZine. Look, I know if I do one weekly that just about anyone can do it monthly! I don't think quarterly is quite enough to get the visibility you're looking for. But when you commit to a monthly schedule, move heaven and earth to get it out on time. If your eZine is sporadic, it just won't have the impact of a regular publication.

Writing eZine Content That Has Impact

I recently wrote an eZine on this topic that I thought was appropriate here. It's about the mistakes we make in writing. And we make a lot of them. All of this applies to writing eZines as well as articles and other marketing material for our businesses. Take a look at this list and see how many of the nine mistakes you make.

1. You're Not Clear About Who Your Market Is

Because you don't want to leave anyone out, you keep your options open and position

your services for just about anyone. They are young or old, male or female, large or small businesses. It really doesn't matter. You delude yourself into thinking there's an "anyone market" out there. There isn't. You can't sell anything to anyone, you need to sell something to somebody.

2. You're Not Clear on What Your Prospect's Problem Is

In fact you don't even realize that your prospects have problems, issues, concerns, challenges, predicaments and pain. But if you can't talk about their pain, how can you talk about the cure for that pain? People are strangely attracted to the discussion of their problems, their issues, their pain. It's magnetic, compelling. Go into exhaustive detail about all the things that are NOT working for your prospective clients, and you'll have their undivided attention.

3. You're Not Clear About What Your Solution Is

Knowing and discussing their pain is not enough, of course. You have to offer a solution to that pain. And by solution, I don't mean process. People don't want to buy your process, they want to buy your results. What are the results you produce? What promises can you make? What can you deliver with a high degree of certainty? Write about that!

4. Your Writing Tone is Not Conversational

The biggest hindrance to effective marketing writing was Ms. Brown, your English teacher. She taught you how to write correctly, but not conversationally or persuasively. As a result, your writing is in a straightjacket, bound by endless rules and formalities. But that's not how people talk to one another. You need to imagine that just one person is reading your article, eZine or web site. Write as if you're writing them a personal letter.

5. Your Writing is Not 100% Believable

Marketing has a bad rap. Some – no, many – marketers have chosen to push the envelope a little too far. They exaggerate the truth until it's not the truth anymore. The funny thing is that they think they can get away with it. They can't. Just saying that everything is better than the best doesn't make it that way. Everyone has a built-in B.S. meter.

6. Your Writing Lacks Passion and Conviction

Some people mistake passion and conviction for exaggeration. And to avoid coming across as a B.S.er, your writing becomes dry and tepid. You CAN be excited about your topic, in fact you must. After all, you can't bore someone into buying from you. At the heart of every business or service is something exciting. Find that excitement and ride the wave.

7. Your Testimonials are Non-Existent or Weak

You say your services have value, that they'll address the prospect's needs, that they'll make a difference. But why should people believe you? I'll bet you have lots of satisfied clients who would gladly chime in with their experience of your services. Make sure they share three things: 1. How it was like before they used your services; 2. What you did for them and what is was like working with you, and; 3. The specific

results they got from using your services.

8. Your Offer is Not 100% Crystal Clear

Even if people know whom you're selling to and what you're selling, and even if you're conversational, believable and passionate, you still won't get a response if the offer isn't clear. Marketing guru, Jay Abraham, says that people are silently begging to be led. They would happily make a choice, if only you would point them in the right direction and tell them exactly what they should do next.

9. Your Value-Build is Ineffective

After people have all but made a decision, you let them down by failing to "sweeten the pot." Your arguments, conviction and proof are sound. Other people agree that your services are the best. But when it comes time to ask for action, you let them down. There's no guarantee, no free bonuses, no reason to act now. So they don't. They wait until they've forgotten what you were offering in the first place.

Now that's a lot of mistakes! You'll realize that some of these mistakes have to do with actually promoting your services and moving people to take action. Realize that this needs to be an important part of your eZine. Your eZine has a commercial motive. You're not just writing a lot of useful articles so that people will like you. That's a start, but not enough.

eZine Promotion – Increasing Your Subscriber Base

Once you have an eZine written and ready to go, how are you going to increase your subscriber base? Here are several methods that have worked well for me.

Opt-in

Make sure your eZine is "opt-in." That is, don't go sending zillions of emails to a so-called "hot list" of people you *know* would like to hear from you. That's called SPAM folks! Don't even add clients, associates or friends without asking them first. This is the number one rule of email marketing. Violate it at your peril.

Seth Godin has written a complete book about just this subject called Permission Marketing. His main point is simply that you need permission to market to people. You need their agreement, because if you don't, you'll get lousy results and hurt your reputation as well.

So if you do a talk and request cards from the participants, don't go putting all of them on your eZine list or it will backfire. Ask if they would like to be on the list and then collect their cards. Here's the stuff you can do that does work.

Tell your friends

When you launch your eZine, you want to let everyone in your universe know about it. There are a few ways to do this. When I started my eZine I had no email addresses to speak of. I was publishing an every-other-month hard copy newsletter to about 600 people. I simply put an announcement in the newsletter telling them about the eZine about to be launched and people sent me their emails to sign up.

If you do have a lot of email addresses, you can let your list know you're launching your eZine. What I'm not talking about is spamming your list by telling them they are now subscribed to your wonderful eZine. That will just annoy a lot of people. You always want an eZine to be opt-in, not opt-out. But if you send an email and let them know you're launching the eZine and include a sample issue, and let them know how to sign up if they'd like to keep receiving it, you'll probably get a decent response. I've had several clients do this successfully with no complaints.

If you already send out printed materials, let people know about your eZine. Put a blurb to sign up for your eZine in your email signature line like I do. When you're networking or giving a talk, make sure to let people know about your eZine.

Signups after a talk

What I say after a talk is: "I have an eZine called More Clients that I send out weekly with tips and strategies for attracting new clients. If you'd like to get on the list, just give me your business card. When you sign up I'll also give you a free copy of my Marketing Plan Workbook." This always gets great response and I typically get 50% or more of the audience to sign up.

Put a sign-up form on your web site

This is where I get most of my eZine sign ups. People come to my web site and fill in the simple form and subscribe. I get from 50 to 100 new subscribers a day. One reason this is so successful is that I've had a web site for some time and I'm now well placed in the search engines (more about that later). About 15% to 25% of those who visit my site sign up.

Use a report as bait

How I was successful at increasing sign-ups was to change the emphasis from eZine sign-up to getting a free report. I tell people to get my free Marketing Plan Workbook and that they'll also get the subscription to More Clients. What difference did this make? Overnight, my subscription rate doubled! Why is this? I think it's getting harder to get people to sign up for just an eZine these days. It's getting to be a crowded field. But if you give something valuable away, you're going to have a much better response. This one strategy may be the most important one in increasing your subscribers. Write that report!!

Give permission to use your articles

One of the best ways to get new subscribers is to have them first read other articles you've written. We discussed this in the previous TeleClass on Articles and Speaking. One way to get your articles published in other places on the web is to put in a blurb at the bottom of every eZine that says people are free to use the material from your eZine as long as they give you attribution and a web link back to your site. As a result, I've had dozens of people use my articles. People then read these articles on the web and get directed back to my site and sign up for the eZine.

Reward subscribers for telling their friends

This is a tool I've used a few times with very good results. It needs a little programming but is pretty straightforward. You create a tell-a-friend form on your site that works like this: Your current subscriber comes to this page and fills in their name and email and then the names and emails of some friends. The friends get an email message telling them to check out the Action Plan Marketing site. And the person who referred the friends gets a free article or report in return. You can see how it works at this link: http://www.actionplan.com/tellafriend.html. The simple programming comes from the shopping cart software I use, 1ShoppingCart.com.

Work on search engine placement

This is very important but it's too long a topic to go into here in much detail. The principle is simple: the more people who visit your web site, the more subscribers you'll get. It also works in reverse: the more subscribers you have, the more people will visit your web site (especially after they get your eZine). For more information on getting on search engines, see Chapter 8 of the Manual.

Buy subscribers

I prefer to get my subscribers from people who refer their friends and from those browsing the web looking for my kind of services. These tend to be better subscribers. That is, they are more likely to buy materials online or become clients. But you can actually buy clients and it can be effective. You want to start slowly with this and see what kind of results you get. It's pretty easy to get a lot of subscribers. The question is, will they ever turn into customers or clients?

There are a few online businesses that specialize in collecting email via co-registration. What this means is that you write a short blurb about your eZine and they place it on a special web page form with a lot of other blurbs about eZines. People come to this page, click on the eZines they're interested in and enter their name and email. When they submit the form, the subscriber gets sent to you.

There are only a couple companies I recommend for this. Unfortunately there are a fair number of sleazy operators and it's hard to know how good the leads are. The first is **Profit Info** http://ProfitInfo.com /leadfactory and the second is **Opt-Influence** http://www.opt-influence.com. Both of them work similarly and are reputable companies. Your cost for a new subscriber is from 18¢ to 30¢, depending on how many you buy at a time.

It's important that you target your ad very specifically or you'll get a lot of subscribers who are very unqualified for your eZine. What I used as an ad recently:

> **More Clients eZine**
> Proven, client-attracting marketing strategies for consultants, coaches, trainers and professionals. Comes with Free Marketing Plan Workbook.

Then you need to do some tracking to learn if these new subscribers are good or not. My experience again, is that they tend not to be as good as from people who came to my web site first and signed up there. Nevertheless, it could be

well worth a test.

eZine Direct Promotion

This is a very important area but it's also one that's abused too often. If you have an opt-in eZine, you will send it out anywhere from once weekly to once quarterly. By sending out free information this way you gain a certain degree of permission from your subscribers to use the list for direct promotion as well. If you do it too often it may be considered spamming by your subscribers and you're likely to get a lot of unsubscribes, but done intelligently and prudently, it can be a very powerful marketing medium.

Let me give you an example. To promote this online manual I sent out my regular monthly eZine and mentioned the manual in the body of the email. Well, I actually mentioned it three times! At the beginning, middle and end. I had just put an enormous amount of effort into this and was very proud of what I'd done. I made the announcements light and slightly humorous. They directed the reader to my web site where they could find the complete information on the manual.

Here's the promotional copy I used:

> It's Ready!
>
> After more than sixteen years of formulating my marketing ideas, after reading countless books, attending several very expensive workshops and seminars, working with hundreds of clients, leading dozens of workshops, designing 50+ web sites, sending out my eZine to thousands of people and writing for hundreds of hours, I've finally done it!
>
> Everything I know about attracting new clients to your professional service business is now gathered together in one place called the "InfoGuru Online Marketing Manual."
>
> If you downloaded my marketing workbook, you may have noticed that it was mostly questions...
>
> This is all the answers!
>
> Take a peek at http://www.actionplan.com/infoguru.html
>
> If you order, as a special bonus, I'll send you a special 90-minute cassette tape on the "InfoGuru Marketing Principle" and "Your Core Marketing Message" but only if you order within one week! (by Sunday, Feb 4)
>
> Did you realize that all the very useful information in this eZine is approximately 1/300th of what is contained in the InfoGuru Online Marketing Manual? Check it out before your frustration about attracting clients makes you give up ;>)
>
> http://www.actionplan.com/infoguru.html
>
> ---

I got many orders for the manual the next day, but I got a phone call from someone who wanted a hard copy of the manual. This is not something I really wanted to do but I figured, why not. I re-posted a new price for the online manual plus the hard copy manual. And I decided to send yet another email to my list the very next day, letting them know. This is what I sent:

> Subject: Hard Copy Manual + Free Tape
>
> To: More Clients Subscribers
>
> From: Robert Middleton
>
> Today I sat in front of my computer all day and filled orders for the InfoGuru Online Marketing Manual.
>
> About mid-morning I got a call from someone who wanted to get it but desperately wanted a hard copy. He had an inkjet printer and couldn't imagine printing it out.
>
> He begged. I relented. And I realized he probably wasn't the only one.
>
> I really didn't want to do this, but I checked around and found a copy place that would duplicate and bind it for a decent price.
>
> The printed and bound manual will be ready in just a few days. It is only available if you order the online manual. This way you will still continue to get the manual updates as I release them.
>
> In addition, I just listened to the tape of the one-day free workshop I led on Saturday and decided to include the first 90-minute tape with every order. After all, only 150 people from my 6,000 person list got to attend the workshop. I cover the "InfoGuru Marketing Principle" on side one and "Your Core Marketing Message" on side two.
>
> However, I am limiting the tape offer 'till this coming Sunday, February 4th.
>
> If you haven't yet read the details about the Online Manual, all you need to do is click here:
>
> http://www.actionplan.com/infoguru.html.
>
> Thanks so much for your interest and your continued encouragement!

The second day I had received almost as many orders as the first day! Here's the logic. On the first day many people see it but don't take action. Some miss it altogether, some wanted a hard copy so they didn't take action, some wanted to order but procrastinated. I still would have gotten orders the second day but not nearly as many. I didn't get any protests for the second emailing. Notice also that I put a time limited offer for the tape. This gets the procrastinators to take action.

But I feel a third email might be pushing my luck. I'll promote it again in the body of my next eZine and will test out other techniques such as different time-limited bonuses, but I don't want to alienate my list and have them feel I'm only

selling to them.

In your business, look at balancing free information with specific offers as I did and don't stop on the first offer. A second email a day or two later can double your response.

Pop-Ups and Other Promotional Considerations

I wanted to add this question and answer from my InfoGuru Support Forum which touches on an important issue:

> Does anyone in the group use pop-up windows to promote their free eZine? I know that Robert does not use one. However, much of the new material coming out is saying that this is an effective tool for promoting your eZine from your web site.
>
> Cheers,
>
> Jeremy Boone

And Geoffrey Bryan responds...

My views on this have changed from what they would have been six months or a year ago, and they are still somewhat in flux, so if you were to check with me in another six months I might say something else altogether. Moreover, not everything I have to say may be entirely consistent. With those caveats, here are my thoughts on the subject:

1. **I think we are now experiencing eZine overload around the net.** So many people have been preaching the virtues of starting an eZine as a means of self-promotion that everybody and his cousin now has one. This is true even if the people have very little to say, or can't write, or really don't have the taste or sensitivity to sustain an engaging, useful, thought-provoking series of essays or news items or whatever. Because of this...
2. **There is now an ever-increasing danger of the "Oh, yuck!" factor** when someone visits a web site and has an eZine subscription opportunity thrust in their face. (This is a term borrowed from Gary Halbert, who uses it to embody a consumer's reaction to opening what looked like a serious piece of mail that turns out to be junk mail.) This is because...
3. **In today's spam-crammed Internet world, a visitor needs a far more compelling reason to subscribe to an eZine than simply the fact that it is available and it is free.** People who have signed up for e-subscriptions of any kind are often finding that they do not have time to read all the ones they are already receiving, and absolutely do not want to add to the clutter in their electronic in-boxes by subscribing to yet another without a pretty good reason. Therefore...
4. **More than ever, it is necessary to make a compelling case for a subscription.** You need, in effect, to position and sell the eZine subscription opportunity with the same persuasion, the same reference to value, and the same risk reduction, as with anything else that may be offered on your web site. Indeed...
5. **Many people have found that a more limited goal may yield better results.** For example, instead of seeking to persuade people to sign up for an infi-

nite series of e-letters, ask them to sign up for a 4-installment series that explains something important. This, at least, has a finite lifespan and does not look like something that will clutter up their in-box forever. You note, of course, that the person can cancel even the four-installment series at any time.

In the course of the series, you might offer the opportunity to sign up for a continuing newsletter, or you might simply send the next issue of the newsletter to anyone who has gone through the entire four-installment series without canceling, perhaps with a cover note explaining that you have this newsletter and thought they might be interested in it but would be happy to take them off the list at once if they don't want it.

Pop-ups and pop-unders have become kind of a headache nowadays. You are no doubt aware of the proliferation of pop-up blockers now available; indeed, the latest web browsers are starting to add this as a built-in feature. (This screws up web sites that have traditionally used pop-ups as little help windows and the like.) Thus, your use of a pop-up to solicit eZine subscriptions risks the following:

a. The site visitor may object to being hit with a pop-up simply because he or she is now sick and tired of all pop-ups of any kind.
b. The site visitor may never see the pop-up because he or she has javascript shut off in the browser, or because he or she has installed blocker software.
c. The site visitor may, out of habit, simply click the close box of the pop-up before it has had a chance to fully render on the screen because he or she assumes it is an ad or something else "yucky."

Now, does this mean you should not use a pop-up in your case? The answer is, neither you nor anyone else will know until you try it and see what kind of results you get. I would, however, counsel the following:

a. Consider delaying its appearance for a number of seconds. Let the visitor at least have a look at your main page – the thing he or she came to see – before you interrupt their visit with what *you* want rather than what *they* want.
b. Don't make the thing lame. A box that merely says "Subscribe to my eZine" with a name box and an email address box is lame. People need reasons to ask for a subscription, and reassurances that they will never, ever regret doing so.
c. As mentioned above, consider asking for a date before you propose marriage. Offer a free report to be sent by email (or the link to the download page will be delivered by email), or offer an autoresponder series, or, better still, think of something new that the rest of the world is not already doing.
d. **Promote the eZine in other ways as well.** Have a place on your web site where you put teaser info about what is in the latest issue of the eZine. Offer access to back issues to those who "register" (i.e., sign up for a subscription). Put a sample issue or two up somewhere so people will have an idea of what they will be getting.
e. **Make the eZine really good, and promote it in other places.** Word of mouth is important, as is favorable mention by other eZines. Only a handful of free eZines are really that good, in my view; the rest are about as useless and uninterest-

ing as the free (printed) newsletter I receive periodically from my life insurance agent. (At least the latter does not try to sell me something in every paragraph, as some of the more ham-handed eZines tend to do.) If you can get endorsements from other opinion leaders, that will really build a valuable list for you.

Bottom line: Try a pop-up and see whether it works for you. Use good taste and common sense. Put yourself in the mindset of your ideal site visitors, and consider why they are at your site, how they got there, and how they will feel about having a pop-up confront them at that point in their visit.

For instance, if the most likely path to your site is through a search engine, then I would think you would have somewhat greater freedom to throw up a pop-up without too much concern – because the visitor will have very little expectation of what will lie at the other end of his or her click anyway. Moreover, in that context, you may only have them for a very brief time (before the "back" button to other search results is clicked), so you might as well see if you can hook them with something really interesting before they bail out.

On the other hand, if the person has come to your site from some other source – say, a mention of a specific reason to visit the site appearing in a magazine or newspaper – then the visitor really wants to see that specific goodie and does not want to have to run a gauntlet of pop-ups and other distractions to get there. That is why, for example, a time delay might be appropriate, so that at least the visitor has a chance to get his or her bearings before having to deal with something unexpected.

The point is, the blanket statement that "pop-ups are always good" is no more valid than the statement that "pop-ups are always bad." They will work in some cases and not in others, and will work for some people and not for others. The only thing you can do is to test them intelligently and see which category you and your site fall under. Just be aware that, for the very reason that the gurus out there are busy preaching the pop-up gospel and so many people are heeding it, they are probably becoming less effective and more irritating as time goes on.

Technical and Management Issues

In this final section we'll talk about some of the important technical issues of managing an eZine. In the "old days" this was certainly more difficult than it is now. When I started I sent my eZine from my desktop using the Eudora email program. The trouble with sending email from your desktop these days is that ISPs, being more and more sensitive to spam, are often not letting you send more than 20 or 50 emails at one time. So in many cases you're going to find this impossible.

Use a Listserv

What I recommend is that people start the easy way and use a listserv or emailing list company to handle it for you. It's pretty simple. You sign up for the service and set everything up via a simple web interface. They give you a piece of code that you put into a form on your web site. When people fill out the form, the listserv company gets the name and email address and then sends you a con-

firmation email as well. When somebody unsubscribes or wants to change their address, they just click on a link at the bottom of your eZine and do it themselves. It's easy, fast and inexpensive.

The service I use, AWeber, has lots of bells and whistles and ability to manage your preferences. You can check it whenever you want online and see exactly how many subscribers you have. You can sign up for AWeber here. They cost about $20 per month. There are a lot of services out there that will manage your list. Some of them are free. I'd personally pay a fee for better overall service and a help line that can answer my questions.

Filtering

One of the coolest things about e-mailings is the ability to use Filters (in Eudora) and Rules (in Outlook Express). This will help you in managing all the email you'll get in response to your eZine.

Filters and Rules allow you to manage your email program by creating different mailboxes (Eudora) or folders (Outook) that filter certain incoming mail. For instance, if you subscribe to a certain email newsletter and you can create a new mailbox or folder, and send that email directly to that mailbox or folder. It is especially useful if you have an eZine (email newsletter) and you want to sort new subscribers as they come in to your email from the listserv.

Here's how to do it.

To create a new mailbox:

In Eudora

Go the Mailbox menu and go down to "New." Put in the name you want that mailbox named and it's done

In Outlook Express

Go File > New > Folder

A new folder icon will pop up in the folders section at the left of your window. Then simply name that folder

Creating Filters or Rules

In Eudora

1. Go to Window > Filters
2. A window will open. At the lower left click on the "New" button. At the right you will see a box that says "Header"
3. Click on the tap and choose what section of the email you want filtered. For instance, if you want any email with a word in the subject line to be filtered, select "subject"
4. Then below, put in the word or string of words you want filtered such as "email signup". Usually the most reliable and simple is to choose the "contains" setting.
5. Then go down to the Action and Scroll down to "Transfer to."

You will then be directed to choose which mailbox you want the filtered email to go to (from the "Transfer" menu.

That's it. You've set up your filter. You can go back and change the setting on this or remove it in the future if you like.

In Outlook Express

1. Go to Tools > Rules
2. A window will open. Mail (POP) is the default. If your email is set up for IMAP or hotmail, choose that tab.
3. Click on "New" and the "Define Main Rule" window will pop up.
4. Create a Rule name such as "Email Newsletter"
5. Under the "If" section where it says "all messages" choose which part of the email you want filtered. For instance, if you want any email with a word in the subject line to be filtered, select "subject"
6. Then a "contains" selector will pop up. In the empty field, put in the word or word string that you want filtered such as "email signup."
7. Under "Then" you will be assigning the action to happen when that email is filtered. Select "move message."
8. In the next pop-up menu that now says "Inbox" select "Choose folder..."
9. A "Choose Folder" window will pop up. Choose the new folder you created, click on choose and you are done.

That's it. You've set up your rule. You can go back and change the setting on this or remove it in the future if you like.

So how does all of this work practically?

Here's a scenario. At the bottom of your eZine you say something like this: "If you'd like complete information on our Marketing Program, just respond to the email below and we'll send you complete details." They send back the email, it automatically goes into your new Marketing Program folder and a letter promoting the Marketing Program instantly goes out to your subscriber.

Pretty cool, huh? This simple filtering technique allows you to answer questions, enroll and confirm people in workshops and send long sales letters only to people who request them. This way you don't have to use long promotional copy in your email.

Is all this technical stuff making your head swim? Maybe you're not familiar with all the terms and you're more confused than ever. If so, I apologize. I can't go into greater technical detail here. I just want to give you a taste of what's possible with eZines. I recommend you do some searching on the web to learn more specifics. Wilson Web might be a good place to start. And taking a course or buying a video or CD tutorial on your email program is a good idea as well. Most people under-utilize their email program. It can provide great leverage if you know what it can do.

Action Plan – eZine and Email Marketing

Who?

Who are the people you need to stay in touch with? Who is most likely to do business with you, do more business with you or refer business to you?

What?

What email system and listserv will you use to manage your eZine? How will you manage sign-ups? What web signup method will you use?

How?

How are you going to develop the systems for keeping in touch? How will you generate the material that you send out? What information will you include? Will you include an offer or a call-to-action?

When?

By when will you start? How will you fit this marketing activity into your schedule?

Resources for eZine Marketing

One of the very best sites on the web for up-to-date and insightful information on Internet marketing is www.wilsonweb.com**.** Go to this site and look up many, many excellent articles on responsible, opt-in email marketing. Wilson himself is one of the world's experts, sending email newsletters to tens of thousands of subscribers monthly. There's a lot to learn here. Don't get overwhelmed by the volume of information though. If you dig deep you can find two or three articles that will really help you in this area.

In fact if you want to go to the section with articles just on the subject, just click here and you'll see a long list of excellent articles that will remove much of the mystery around email marketing. But also poke around other corners of the Wilson site. There's pure gold to be found. You might even want to sign up for his free eZine and see how a pro does it!

Another excellent resource is Boost Your Business With Your Own eZine by Alexandria Brown – **This is a comprehensive e-book on how to create and market an eZine.** This manual covers even more step-by-step details on how to launch a successful eZine. I highly recommend it.

There's also a very good free article by Alexandria on Guru.com on Spreading the Word by Publishing an Email Newsletter.

I'm also a big fan of the eZine, **eZine Tips**. It comes every week with great ideas and some very sophisticated strategies to make your eZines more effective. Highly recommended. http://Ezine-Tips.com

Another good site with lots of excellent web marketing resources is E-Fuse.com. One article on email marketing vs. Spam is especially useful. Check it out!

One more is www.e-Zinez.com that has a series of articles on starting an eZine that is also very good.

Also see an example of an eZine Article in our "eZine" Appendix section.

Books on eZine Marketing

Permission Marketing – Seth Godin

Guerrilla Marketing Online – Jay Conrad Levinson

The Consultant's Guide to Getting Business on the Internet – Herman Holz

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 15

Writing Motivational Copy

Writing is the Key

As an InfoGuru, you need to wake up to the fact that a big part of your marketing will include writing. Writing is the key to it all. And when you master the art of writing motivational copy or persuasive copy, you'll have a tremendous power at your disposal. By writing just a few sentences or paragraphs of motivational copy, you can literally move thousands of people into action to learn more about your services or to purchase your products.

Now that's power. But I'm willing to bet a buck or two that you have no real idea what motivational copy actually is. By the end of this section you'll not only know, but have the essential tools to enable you to write powerful motivational copy as well.

InfoGurus use free information to build value and relationships and then use motivational copy to urge people to take action.

Let's look at the many places you can use motivational copy. Some of them have been covered previously in other sections.

- Marketing Materials and Web Sites
- Headlines for Articles, talks, web sites, etc.
- Articles
- Books
- Talks and Presentations
- Sales letters
- Email newsletters or eZines
- Proposals

Now in each of these cases the writing style is going to be somewhat different but in all of them you can use motivational copy.

What IS Motivational or Persuasive Copy?

Writing motivational copy means writing that will motivate or persuade your reader to take action. Other kinds of writing include editorial, academic,

nonfiction and essay writing, used to educate and inform and short story and novel writing used to entertain.

If you use academic writing to persuade, you'll fail miserably. And if you write artfully, as in a novel or short story, you may entertain but fail to persuade anyone to do anything.

Let's say we're going to write about management strategies that will increase profitability. You are a management consultant and you can help your clients increase profitability. So you want to write motivational copy that will get them interested in your services. Let's look at the different ways you could do this. First a couple that are not motivational.

Editorial or academic style:

> "Management methods have evolved a great deal in the past 50 years, from command and control to flat management structures that empower individuals to take responsibility for their actions. Unfortunately too many companies are stuck in the dark ages of management, doing things that simply don't work. The command and control model has its roots in the military and was adapted widely in the industrial revolution. It worked then but the world has changed."

OK, this is fine as far as it goes. It informs. It might be interesting to the reader. But the thing that's missing IS the reader. That is, it's all about management styles, not about me the reader. So you don't get emotionally involved and you're not necessarily motivated.

Story writing

> "Management is an enigma," thought John. "Everyone here knows what needs to be done. I give clear instructions and everyone seems to understand. And then they do the opposite!" John was bent over his desk shuffling through a pile of paperwork at the end of the day, musing over the frustrations of being a new manager when a headline on a brochure caught his attention: "The New Management – Getting Things Done Without Being a Dictator." "Yeah, sure," John said to himself. As he picked up the article, he began to read.

Now this kind of writing is fine in its place. It might be the beginning of a short story or a novel about business. But primarily the purpose is to entertain and engage the reader, not to motivate him or her to take action.

Let's take the same topic using motivational writing.

Motivational writing

> "Are you frustrated managing people but not getting the results you expect? Have you tried to apply the newest theories of management and supervision with less than outstanding results? If so, you're not alone. What the new management theories don't tell you is that they are more of an art than a science. They take more than following recipes but require some advanced "cooking skills." The good news is that these skills can be learned and mastered to produce business results

you had all but given up on.

"Learn about the ten management skills you can master in a week that will enable you to • complete more high-priority projects on time • delegate to people who will do a better job than you • remove all resistance when giving instructions.... To learn more about mastering these ten Power Management Skills, fill out the form below for a free copy of our report: "Secrets of Power Management."

What Makes Copy Motivational?

1. It is **personalized**. It is talking to YOU, not some theoretical person out there.
2. It addresses **your needs** and concerns and frustrations in real-world terms that you can easily relate to.
3. It offers **hope** that there is an answer around the corner that can help you address those concerns and frustrations successfully.
4. It tells you what you **need to do** to get the results you want.

Motivational copy can take many forms

It can be short or long. It can be about anything under the sun but it MUST adhere to those four simple principles outlined above. And now that you know the inside secrets to writing motivational copy you can apply those secrets to everything you write. It's quite simple.

First, be very clear who you are writing for. Who are they? What are they interested in? What are their problems, concerns, frustrations?

Next clearly identify their particular need, problem, concern or frustration in a way that makes them realize you really understand them.

Next show them how you can solve that need, problem, concern or frustration – again in a way that is credible, believable, approachable and affordable. List benefits, give examples, tell stories, anything that will build your case.

Finally, make it easy for them to take action by telling them exactly what they need to do to get the benefits of your solution.

Applying motivational copy strategies

Marketing Materials and Web Sites

Just use the formula as outlined. Take as much space as you need to make a complete case for your solution. See the section on Packaging Your Services in Writing in Chapter 6.

Headlines for Articles, Talks, Web sites, etc.

This is covered in the section on Headlines in Chapter 11. The point is that you need to be very concise here and make every word count.

Articles
This format may also include some editorial, academic or story style writing but you still want to make the readers of your article identify with the problems and solutions you outline. See Chapter 12 on Articles.

Books
Really just a series of articles. Talk about problems and solutions, not endless musings on what things mean. Leave that to the philosophers.

Talks and Presentations
Open with the problem. Close with the solution and a call to action. See Chapter 12 on Speaking.

Sales letters
A very focused type of motivational writing, the purpose of which is to get people to take action now. You need to be very clear about the benefits you are offering. See Chapter 16 on Direct Outreach.

Email newsletters or eZines
At the end of each eZine use motivational copy to get people to do something such as visit your web site to read more motivational copy about a product or service you're offering. See Chapter 14 on eZines.

Proposals
Start with the problem and the objectives and then outline how you will help them solve those problems and reach those objectives. See Chapter 21 on Proposals.

My Approach to Motivational Copy

Everyone's approach to writing motivational copy is somewhat different, but let me give you my approach that has worked very well for me. I'll take you through a 10-step process.

1. **First consider your audience.** Who are they, what are their needs, their interests, their motivation? What are their problems, what have they bought similar to what you're offering? How are they likely to react to a letter or to an email? The deeper you can get inside the head of your buyer, the better.
2. **Next, consider your service or product.** What results can they expect to receive by using this service or product? What are all the benefits, advantages, features? Are there certain bonuses or added value you can include with the service? Are you confident that you have the very best service that will make a real difference? If you don't, all of this will backfire on you!
3. **I usually start writing by outlining the problem.** I let them know that I understand their situation, what they are going through, what's bugging them or what they might be looking for. Then I give them solid assurance that I have something that will help them with their problem/pain/predicament.
4. **Next I talk about the biggest results they can expect if they use this service.** I make sure not to exaggerate or overdo it, but I clearly outline several of

the main reasons why this service will make a real difference to them. Note that I don't tell them here HOW I do what I do, just what they will get. This is a key InfoGuru Marketing principle.

5. **Now I give some background or proof that this service will give the results I just stated.** I might give a bit of background or tell a story and then give several actual examples where this service was used and what kind of results ensued. Don't exaggerate. Simple facts, with specific results are what people respond to.
6. **Next I tell them a little more about the service and give even more benefits and advantages of using this service.** You don't want to overdo it, but remember that different people buy for different reasons. So give every good reason that you can think of.
7. **If I have some testimonials, I might add them at this point.** The best testimonials are ones that talk about actual results of using your service. Telling how great you are to work with doesn't hurt either.
8. **Now I tell them what they get.** Again, I don't give away all my secrets about what is contained in the service, but I'll talk about the format, the timing, the materials, etc. These are the features and they are important, but not as important as the benefits, so they come later when people have already bought emotionally. The features are physical and tangible.
9. **Next I tell them the price and how to order or how to respond.** Sometimes a direct letter of this sort is only asking for a response to something free such as an introductory workshop. I tell them exactly what they need to do to take action and I make it as simple and as clear as possible, without leaving out any important details.
10. **Finally I give them a reason to act now by adding a time-limited bonus or incentive.** This could be a price that's valid for a certain time, a limit on attendance, a free tape or report etc. Remember, that you are doing everything possible to overcome reader inertia. It is always safer NOT to act. Give them reasons why it makes sense to act NOW!

That's my basic strategy. Now let me give you some additional tips.

Motivational Copy Writing Tips

Every time you write copy – a brochure, marketing letter, flyer etc., use the following 20 guidelines to give your copy impact. After you've written your copy, go over each and every point and see if your copy measures up.

1. The copy, first and foremost, needs to be about the interests, needs and concerns of your prospects, not about you or your services.
2. The copy needs to answer the questions: "What's in it for me? What exactly do I get? Why should I care?"
3. DON'T BE CLEVER! Your job is to persuade, convince and sell, not to show how brilliant you are. They don't care.
4. Build prospect benefits on top of prospect benefits – hammer home the cli-

ent-centered benefits over and over. Put benefits FIRST, followed by features.

5. Don't be "Professional" – that is, stiff and formal. Be conversational, informal, as if you were speaking to them one to one.
6. Motivate your clients through outlining the implications of not using your services. Be specific about what will happen if they don't act.
7. Be human. If there's a downside to the service, mention it. Really! If it's nothing but superlatives, people will be more suspicious. Not every service is perfect or for everyone. Let them know that.
8. Avoid jargon or industry-specific language – write clean, clear, crisp copy that enlightens, not confuses. Use your mother to check out your copy. Your reader is at least as smart as your mother!
9. Make your copy Exciting, Dynamic, Riveting – not Dull, Boring, Sleep-Inducing. One way to do this is to write very fast on your first draft. Write it all at one sitting. You might even speak it into a tape recorder and then transcribe it.
10. Give the reader a reason to act right NOW! – not tomorrow, not someday. But have those reasons be legitimate, not transparent hype.
11. Know what you want the prospect to do and tell them what will happen (in great detail) when they take action. Reassure them that they are making a wise choice.
12. Give them a reason to respond in some way and then stay in touch if they are not interested, or unable to buy your services now. i.e., get your newsletter or a free report.
13. Offer them additional incentives to take action, such as bonuses or value-added services that come with the main service.
14. Give your prospect sound reasons to trust you. All his fears and insecurities should be addressed. Illustrate clearly what you've done to help your other clients succeed.
15. Tell them the specific benefits they'll receive if they use your service. Outline these benefits in complete detail. Remember, lead with benefits and follow with features.
16. Put your copy in the active, not passive, voice: from "Customer information was gathered" to "We gathered customer information." Also talk directly to your reader, not to a vague "them or they." Use the word YOU throughout your copy.
17. Make sure you get powerful testimonials from customers. What did you do for them and what difference did it make? Again, no vague generalities.
18. Be bold, strong and secure in your marketing copy and in what you are offering. Don't be tentative or conditional.

19. Guarantee your buyer's satisfaction. Tell them exactly how your guarantee works and demonstrate how they have very little to risk if they use your services.
20. For every piece of copy you write, hold it up to the ultimate marketing test: Is this copy doing everything it possibly can to move my prospect to take action NOW?

How to approach the actual writing

Write quickly. The quicker the better. Once you've given some thought to what you're going to write, are clear on the problems and solutions and benefits, then it's time to sit down and start writing.

Write quickly from the opening sentence to the end without a break. It doesn't matter if you write longhand or on a word processor. Don't stop for even a few seconds to muse, to edit or to criticize what you've written.

- Now read over your copy and start doing some editing, moving things around, fine tuning.
- Go over all the points above and see if you've included the majority of them in your copy. Are you missing powerful benefits, consequences of not using your services, a strong call to action? If so, work at adding each of these elements.
- Ask yourself if the copy is long enough to move your reader to action. If you're urging them to call for a free report your copy doesn't need to be as long and detailed as when you are selling them on an expensive workshop.
- Give it a rest. Put it aside for a few days. Then pick it up again and read it with fresh eyes, making more corrections, additions and fine tuning.

Action Plan – Writing Motivational Copy

1. Pick something to write and then write it! It may be a letter or the copy for your brochure or web site.
2. Go over each of the four key principles of writing motivational copy first and then go down the list of 20 points above to do what you can to improve the copy. You can't always adhere to every one, but do your best.
3. Run it past some people and get their reaction. Not their opinion.

   Opinion: This copy is too long.

   Reaction: I got bored half way through the letter.

   Opinion: Guarantees make you sound desperate.

   Reaction: That guarantee really made me feel you were confident about your services.

   Opinion: I don't think people are looking for this kind of service.

   Reaction: I was intrigued by a service like this and wanted to know more.

   Opinion: You shouldn't use this kind of type and format.

   Reaction: I found the letter hard to read.

Get it? Then take those legitimate reactions and do what you can to make corrections and improve your copy.

4. Put the copy out there. Test it. Mail some letters, put the copy on the web site, mail out the article and see what happens.
5. Repeat this process until the day you close your business (after retiring with so much money you don't need to work ever again!)

Resource for Motivational Copy

In our Goodies Section online **– Killer Copy Tactics for the Web** by David Garfinkel

Books on Writing Motivational Copy

Cash Copy – Jeffrey Lant

The Ultimate Sales Letter – Daniel Kennedy

Rapid Response Advertising – Geoff Ayling

Tested Advertising Methods – John Caples

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 16

Direct Outreach or Direct Mail and Calling

Making Direct Outreach Work for You

Direct Outreach usually means a combination of mailing and calling prospective clients whom you have targeted as good potential clients for your service. For most InfoGurus, mass direct-mail is not advisable. It is expensive and risky. However, personalized or highly targeted mailings can be quite effective.

Direct Outreach spans the gap between promotion and persuasion for InfoGurus. Ideally you want to get visible and get known so that prospective clients call you. Direct outreach is more proactive. You are trying to get a result NOW. In the previous section on Motivational Copy I explained how to write copy that gets results. In this section we'll look at many of the specific ways to use that motivational copy.

Direct outreach can work well when...

- You are just starting your business and you have a very small network to draw from.
- You want to target a very specific potential client.
- You have a lead and the only way you'll get to them is by contacting them directly.
- Business has slowed down and you want to drum up new business quickly
- You have a successful business but you want to introduce a new service.
- You want to saturate a particular market very quickly.
- You want to build a larger mailing list in order to initiate "keep-in-touch marketing."
- You have a promotional event and you need to get people to attend.
- You want to drive people to your web site or to a trade show booth.
- You have a seminar or workshop and you want to get enrollments.
- You want to market a new service to existing clients.
- You want to follow-up prospects after an initial contact.
- You don't like other marketing strategies and this fits with your temperament.
- In your kind of business, it's very hard to get word-of-mouth referrals.

Direct Outreach Guidelines

Purpose of your direct outreach campaign

What do you hope to accomplish with this outreach campaign? Do you want to make a sale? Do you want to stimulate a call? Do you want them to ask for more information or look at your web site?

Here's where people often make the biggest mistake. They put together a letter and mail it to a list – perhaps one they've purchased or compiled – and in this letter they tell a little about their services and include a brochure that has more detail. In my experience as a consultant, these kind of mailings typically get a 0% response. Yes, that's right, nothing at all.

Why is this? Several reasons.

The first is that even though your services may be valuable, your prospective clients simply don't need them right now. So they toss the mailing out. They figure that you'll probably mail again. You need to realize that most don't need your services right now. Therefore you need to devise a reason for them to respond right away – some call-to-action that will have them contact you to request the offer you made.

You did make an offer, didn't you? Probably you didn't. You just wanted them to respond and ask you about your services and you'd then have the chance to turn them into a client. But think this through. Buying high-end services is scary. It's risky. If they pick up the phone they might make a mistake. What if your service is not as advertised? Probably better to just wait and do nothing.

So you want to make an offer that's low-risk. Often I see offers for a "free initial consultation." That can sometimes work but can be perceived as risky as well. "I'll have to spend an hour or more with you and I don't know if I can risk wasting that time." People take advantage of free initial consultations if they know a bit more about you first – more than you can tell in a mailing (such as following up after a workshop you've given – see below).

What does get response? Risk-free, value-added offers. Things like free reports. Free newsletter subscriptions, introductory workshops or presentations, free gifts, etc. As an InfoGuru, one of the best things you can do is give away your knowledge. This softens people up. It lets them know what you know. It makes them more receptive to your future marketing.

The purpose of a direct outreach strategy is not always to get a sale or even an appointment but to simply get the person you are contacting to request something or respond to your free offer. I once did a direct mail postcard whose only purpose was to get recipients to visit my web site. Period. I didn't pitch my services. I pitched the value of the web site to them. Once they visit I'm hoping that a certain percentage will sign up for my eZine. And a certain percentage will purchase my Workshop on Tape and a certain percentage will eventually call me to inquire about my services.

Formats for direct outreach

There are many, many formats you can use in direct outreach. Usually it is a combination of mailing and telephone calls. Sometimes one or the other. Sometimes both. Sometimes several of both. Let's look at mailings first. There are a wide variety of mailing formats:

- Calls
- Letters
- Email
- Postcards
- Brochures
- Invitations
- Specialty items

Calls

Perhaps the most often used form of direct outreach is simply calling up past clients to "drum up new business." This can be effective if done well. The main point I want to make is that you don't ever want to call out of desperation. Ideally you want to call when you're busy. That's right, not when you haven't had a project for 3 months. Molly Walker of Walker communications says this:

> "Sometimes it's hard to make that phone call to check in with clients or potential clients, even when you're pretty sure they like you! I find it easier to make that call when I'm in the middle of another project and already busy doing something. That way I'm psychologically up and my mind is alert. I find I'm likely to present myself better as well."

And in the true spirit of InfoGuru Marketing, when things are slow, **don't just call past clients looking for new work,** send them something valuable such as a report, survey results or other information, and then follow up to discuss it. You'll get a much better reception than "begging" for work.

Letters

Letters are generally the most effective kind of direct outreach mailing. Why? People actually do read letters. No, not 100% but a fairly large percent will at least give a few seconds of attention to your letter before they toss it out. A letter is more "reader-friendly" than brochures and other mailing pieces that are more "designed."

In a letter you have the room to build a solid case for your proposition in a conversational way. It is a one-to-one communication and can be very personal.

Email

Email can work as a direct outreach vehicle if you already have a relationship with your recipient. If they are past or existing clients, are already on your eZine list or recently attended a workshop or presentation you gave, this kind of contact will not usually be regarded as SPAM or unwanted email. The advantage of email is that it is virtually free and often the response is higher because people are able to respond immediately. Don't abuse it, however. A barrage of emails promoting your services can result in a backlash from recipients.

Postcards

Postcards are great for getting immediate action on something very simple such as directing people to a web site, announcing your booth at a trade show, announcing an event or open house, or sometimes simply reminding about a common service such as graphic design, writing or computer repair.

Brochures

Brochures are not the best direct mail piece except as a stand-alone piece for a seminar. This is generally a good format for promoting seminars and workshops. Fancy, multicolored brochures about your services are best used in a follow-up, not as part of an initial mailing.

Invitations

Invitations can announce an event, a seminar, an in-house demonstration, a party, anything like that. Invitations are read and they can get very good response because you are asking for response for a very specific, time-limited event.

Specialty Items

Did you ever receive something interesting in the mail? Of course you did. I once received a large tin of Altoids mints and a note that pointed me to a web site. I kept the Altoids and never looked at the site! I've gotten watches (from a designer), a rolled up map of Italy (from Hewlett Packard) and pens from pen companies. Imprinted specialty items definitely get attention and can work but they can also be very expensive. An associate sent a letter and included a pin-on button with his marketing message. It combined the best of a letter with a specialty item that wasn't too expensive. It worked very well.

Making letters work for you

Since letters are often the best direct outreach tool, let's look at how to make letters more effective. In the following example we'll use a direct response letter whose purpose is to generate requests for a free report. First, what are the various elements of an effective letter?

- Personalization
- Headline or opening sentence
- Opening paragraph
- Body of the letter
- Bullet points
- Closing paragraph
- P.S.

Personalization

A letter is more likely to be read if it is personalized. This usually costs more but the increased response will usually offset the additional cost. By personalization, I simply mean to use the recipient's name in the salutation. You might also include the company name, address, etc. as well.

Headline or opening sentence

This is the most important part of a letter. Your letter must lead with a strong benefit and a reason to read further. Headlines work quite well on many letters. Sometimes a strong opening sentence will do just as well. You want people to understand the gist of the letter in about 2 seconds. So don't beat around the bush. If you want to get them to respond to a free report, offer it in the headline or first sentence. Don't wait for the third paragraph.

> Free Article: "10 Ways to Improve Teamwork"

Read the section on Topics, Titles and Headlines for more help with this area.

Opening paragraph

After the headline or first sentence, elaborate on your offer in the first paragraph. For instance, if you are offering to send a free report on ten ways to improve teamwork, you might tell them a bit about it. For instance.

> "I would like to send you a complimentary copy of an article that recently appeared in HR Monthly titled, "Ten ways to Improve Teamwork." The article is the first in a series based on work I did at Cisco systems in the early part of 1999. "

Body of the letter

The next part of the letter builds the case for receiving the report and lets them know a bit about you and why you're sending it. Everything in the letter is YOU-oriented. That is, it answers over and over again, "What's in it for you" if you take the action I'm proposing.

> "If you've been struggling with developing effective teams, if the teams in your organization are underperforming or you just don't know where to get started in improving teamwork, this report is what you're looking for.
>
> "Not only does the report give you leading-edge ideas on how to make teams more effective, it will point out the pitfalls most organizations fall into that virtually doom the effectiveness of their teams from the very first day."

Read the section on Writing Motivational Copy for more detailed explanation on how to do this well.

Bullet points

Bullet points serve to break up the text and add some visual interest. You might list several benefits as bullet points, or in the case of the report mentioned above, talk a little about the content of the report:

> "The report reveals several new findings about teams:
>
> - Teams are more effective the smaller they are
> - Teams without a mission are a total waste of time
> - Teams with a defined life span tend to be more effective."

Closing paragraph

Let the reader know what they should do to take advantage of the offer. Tell them exactly what to do. Exactly. Don't leave anything to chance. Always clarify, never confuse. Make it simple, never difficult.

> "To get your free copy of "10 ways to Improve Teamwork" simply fill your name and address on the enclosed faxback form, answer the five questions on the form and fax it back today at 510-555-9876. "

P.S.

A PS is important because it is almost always read. So you can use it to emphasize the benefits of your offer:

> "P.S. If you send for this report today we'll send you an additional valuable gift, our one-page sheet on 'Ten Things Teams Must Do to Be Successful.' "

An even more personalized approach

The letter with faxback form is a good way to get a decent response when sending to a fairly large group. But what if you just want to contact a few people and follow up with a phone call? What do you put in that kind of letter?

Actually the steps are very much the same, only you will not have an offer. The letter's purpose is to grab attention and warm them up for your follow-up call.

I propose that you go back to the central message of your business. What is the ultimate result you are promising to your clients? Next, what is a great result that you have provided for a client and finally, do you have a testimonial quote from that client?

You can tie all of these together into a very compelling letter. Here's an example of one I might use to warm up a call to attempt to get an appointment from a person that was referred to me and that I had difficulty reaching by phone.

> Dear Mr. Snyder,
>
> Our mutual associate, John Jones, suggested I contact you. Since 1984 I've been helping professional service businesses like yours attract new clients.
>
> What I do is either help established businesses grow their businesses by implementing marketing strategies that attract new clients consistently or I work with brand new businesses and help them build a professional practice from scratch.
>
> I recently received this letter from one of my clients:
>
>> "In the time we've worked together, I've gone from not even having a logo or brochure to now getting more work than I can handle from prospects that call me. And all this while working on opposite sides of the country!"
>>
>> Brien Palmer – Brien Palmer Enterprises, Management Consultant
>
> John said you had just started a new consulting practice and wanted to get off to a fast start. I can't tell you without speaking to you if we can help you or not but I'd be happy to spend some time on the phone to see what might be possible.
>
> I'll give you a call early next week to discuss your situation.
>
> Sincerely,
>
> Robert Middleton

See how unthreatening this letter is? It establishes what I can do but it doesn't push. It makes the reader want to know more. It doesn't even ask for a response. This is a great kind of letter to send if you have a strong lead.

Of course, you must follow up a letter like this with a telephone call!

What do you say in the phone call? Check out the section on Making Appointments.

A few things to consider in making letters more effective:

- Is your letter directed to the recipient's self-interest?
- Does it give an immediate reason for reading?
- Does it continue the interest throughout the letter?
- Is your letter conversational and easy to read?
- Does the letter make perfect sense and make no leaps of logic?
- Is the letter completely believable and credible?
- Are you making an offer that is desirable and compelling?
- Do you direct the person to take exactly the action you wish them to take?
- Have you thought through all the possible things that could go wrong?
- Is your letter free of typos and grammatical errors?
- Will you be able to respond easily to the response the letter receives?
- Do you have a follow-up plan after they take advantage of the offer?
- What exactly will you say on the phone on your follow-up call?

Warming up cold calls

Hardly anyone likes to make cold calls – that is, calls to strangers where you try to get them to buy from you. As a professional service business, cold calls are generally not recommended, not just because they're so difficult to make or because they produce poor results but because people don't like to get cold calls. Why set yourself up for rejection?

But what if the only way to get to a potential client is by making a call? What if you know there is no chance in the world that they will call you? What if all your efforts to magnetize clients aren't working?

A recent client I met with, an executive recruiter was on the verge of planning a direct cold call campaign. He had assembled a list of 1500 prospects. I questioned his approach. I said there were many, many reasons that would make this process very difficult, if not completely futile:

1. They don't know you and will look at this call as an interruption.
2. They probably don't need you right now so the odds are low of reaching someone who is ready to set up an appointment.
3. You'll probably get voice mail so, unless you have something pretty compelling to say, they're unlikely to return the call.
4. Once you've called what do you do next? You really have no plan for follow-up or long term marketing.

I recommended combining cold calling with the InfoGuru Marketing approach.

1. Since you are specializing in placing customer-oriented sales people, why not offer an article titled something like: "Why You Can't Hire Customer-Oriented-Sales People."
2. Call with an offer to send them the article, not an attempt to make an appointment.
3. If you have the opportunity, try to find out a little about their company and the challenges they have in hiring customer-oriented salespeople.
4. Ask permission to get back to them. Even try to set a phone appointment to talk about the ideas and approaches outlined in the article.
5. Put everyone who requests the article on a mailing list who will receive more articles at regular intervals.

In short, I recommended he try the long-term InfoGuru Marketing Strategy of building long-term credibility. It sure beats trying to wrestle someone into making an appointment.

Here are some ways to make "magnetic warm calls"

1. **Research** – Ask people in your network if they know the person you want to reach. You'd be surprised that with a few calls you might find a direct connection. Find out as much as you can about this person. See if you can find background materials about them on their company's web site. When you call, you won't be such a stranger. You can use your contact's name and also your knowledge about them and their business to get attention.
2. **Letter** – Send a letter before your call. Follow all the rules we outlined in the previous section. If you are planning to follow up with a call and are not expecting a call back, make it very benefit-oriented and let them know you will be calling. Always have a very specific reason for your call. The reason should always be about solving a problem or informing about an opportunity.
3. **Articles** – Send a note or short letter with a copy of an article. Send an article every few weeks – say three or four times. Make sure the articles are relevant to their situation. Then send one more letter that says you will be calling to learn more about their company. This is a great soft-sell technique. The articles warm them up. This is good, especially if you don't know anything about the needs of the company. The focus is on them, not on you. This technique is outlined in detail in Geoffrey Bellman's book, "The Consultant's Calling." Worth checking into. More on this in marketing with articles.
4. **Invitation** – Invite them to an exclusive event, workshop or seminar which their peers will also be attending. This has to be done absolutely "top drawer." The anticipation of rubbing shoulders with other top movers and shakers in their industry will often move them to action. You are more likely to succeed at this if you have a few clients in this category already who act as magnets to

the invitees. After you've sent the invitation, call and invite them personally by phone.

The key to all these approaches is personalization. Make your contact personal, relevant and high-value and you're much more likely to get attention.

Some things to do and not do when making calls

DO do:

- Practice out loud what you will be saying on your call.
- Research, if possible, to learn more about the person you're calling.
- Always open with a benefit or a reason to listen to you.
- Think through answers to every conceivable question that might come up.
- Be upbeat and friendly on the call, but not overly solicitous.
- Think of (and write down) every possible question you might ask
- Think through and practice how you will close the call.

DON'T do:

- Read a script ever, ever, ever, ever, ever.
- Come to the call unprepared.
- Have no purpose, agenda or direction for the call.
- Beat around the bush and don't get to the reason of the call.
- Ask if they got the brochure you sent.
- Ask obvious, closed-ended questions.
- Argue with the person you're calling.

We'll get more into specific how-tos in the chapter on Making Appointments.

Selling services to existing clients

This is one of the very best ways to use direct outreach for one simple reason: Those who receive your letter or email or postcard already know you. They've used your services. They trust you. You will almost always get a better response with direct outreach to your existing client base.

In using direct outreach to **new** prospective clients I've found I get the best results if I make some kind of initial free offer. I then follow up or capture their contact information for future contact.

However, when you're contacting your **existing** clients or those on your "keep-in-touch" mailing or eZine list you can and should make a direct offer. That is, use your letter or email to sell. I've found this to be one of the most powerful marketing strategies of all and I do it frequently.

I won't go into the how-tos of writing copy for direct outreach pieces like this. You can learn about that in Chapter 15 on Writing Motivational Copy, but I will give you several examples.

eZine Promotion

At the bottom of every eZine (see Email Marketing for more details on setting one up) write a 3 or 4 sentence pitch for a product or service with a hot email link back to your web site where you have a more detailed "sales letter on line" that promotes this product or service. I've used this frequently and effectively in promoting my Client Magnet Workshop on Tape.

Sample from a recent eZine

> Speaking of information products: The "Client Magnet Workshop on Tape" is a great example of solid information at a fair price. You get nine hours on tape of two live workshops for the price of 40 minutes of my in-person consulting time! Check it out at www.actionplan.com/workshop.html.

Direct Email Promotion

This is very similar to the above except that you send the email by itself, without the eZine. I do this because it tends to get more attention than the brief note at the bottom of the eZine. You will get very little objection to this if you have a very valuable eZine and don't send out stand-alone promotions more often than the eZine itself. I also usually make the promotional copy somewhat longer – but usually no more than a screen's worth of information. Then they can click on the link to the web site. You can use this method for free offers as well. I used this for my free Marketing Workbook and my free Annual Marketing Workshop. The response was incredible. These offers then lead to future sales.

Direct Letter Promotion

This is very much like an email promotion, except by letter. I don't tend to do this as much as I used to. It's time-consuming and more expensive but, depending on your situation, it might be quite effective. Perhaps you want to invite a group of business owners together for an "Executive Briefing on e-Commerce." A letter, followed up by a phone call will be perceived as more personal that an email. It's probably going to be more effective. And since this would be sent to a fairly small group, the time and expense are not such an issue. If all those executives are already on your emailing list, then email will likely work just as well.

Postcard Mailing

Say you're doing a talk at a professional group or are giving a talk at a local conference. Simply use a postcard to announce your talk to your existing clients. Many companies use postcards to get people to come to their booth at a trade show where they're exhibiting. Often the organizers of the show will provide a mailing list of attendees. It works better if you have some kind of contest or drawing to attract them to your booth.

Letters for follow-up

One of the most common uses of letters is in follow-up after an initial contact. Situations where this would be appropriate would be.

- After working with a client for the first time

- After a class, workshop or presentation that you gave
- After meeting someone at a seminar or conference

In these cases write a letter that establishes a connection and then makes an offer of some kind. The following letter from one of my clients illustrates this well. Emily Blanck of At Work Communications sent this letter to people who had attended her two-day class on project management. She wanted to reconnect and then offer to meet with them. By the way, she sent some of the people on her list letters, some emails.

Dear...

I hope you have had time to put some of the tools and tips from the Project Management Class into action steps for your present projects. Just for your review, here are a few of the top strategies for starting a project.

1. Identify Team Sponsors, Stakeholders and Champions
2. Developing a team charter that includes the Team's Purpose, Mission and Goals
3. Select Team Members
4. Contact Team Members
5. Conduct a Team-orientation Session
6. Develop Team Processes, Such as Status Mechanisms, Review Points and Documentation

I would like to know if you have been able to implement any of the strategies we discussed and which ones have been most useful to you.

At this point people often face challenges to implementing these strategies. Some of the challenges are:

1. Reverting to old habits
2. Finding the time to implement the strategies
3. Lack of cooperation from the rest of the team to try the new strategies.

This is all normal and expected. They are discouraging but not impossible obstacles to overcome. Many people when they hit those road blocks call me in to help them with some aspect of their projects. One of the best ways to break old habits, find the time to implement the strategies and gain the cooperation of the rest of the team is to:

1. Train the entire team on the whole process – then everybody's on board, speaking the same language. The changes become internal and they get absorbed into the organization.
2. Observe the project team during meetings and coach the Project Manager on how to more successfully deal with the issues that come up. Then the PM internalizes the changes they need to make.
3. Work with the entire department of Project Managers, so every one has the same tools, language and methodology to implement teams effectively. This allows better integration and cooperation between Project Teams. Orienta-

tion of new team members is easier because everyone has been exposed to the same methodology from previous Projects, expectations are the same across the board for team members.

For those of you that are experiencing challenges, I am more than happy to come without obligation for an hour or so to discuss how I might assist you. It is a good idea to get together one or two others from your department so I can have a clear picture of the issues involved. Right now I am booked through April in terms of projects, but I am happy to meet briefly with a few people. Please let me know if I can be of assistance.

Cordially,

Emily L. Blanck

Action Plan – Direct Outreach

Who?

Who are the prospects that will respond best to direct outreach? What would the ideal situation be for making contact in this way – a cold contact, a follow-up to a referral, networking contact or a follow-up to an existing client?

What?

What information will you put in your direct mail piece or letter? What will be in the opening paragraph, the body, the bullet points, the call to action, the P.S.? What additional materials will be needed to go with the letter?

How?

How will you create the mailing piece? Will you use email? Will they all be unique (personalized) or will you create a template and customize them? What is your plan to follow up on the letters you send? Will you send more than one letter? Will you call?

When?

By when will you start? How will you fit this marketing activity into your schedule?

Books on Direct Outreach

Sales Letters That Sizzle – Herschell Gordon Lewis

Endless Prospects – Richard Weylman

Selling to Vito – Anthony Parinello

The Power to Get In - Michael Boylan

The Ultimate Sales Letter – Daniel Kennedy

The Consultant's Calling – Geoffrey Bellman

Cash Copy – Jeffrey Lant

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 17

The Professional Selling Process

Selfish Selling Vs. Selfless Selling

Selling, I am convinced, is one of the most misunderstood processes of all time. Almost universally, we have negative stereotypes about selling. Many of us think of salespeople as selfish deceivers who lack any semblance of integrity. We think of salespeople as fast-talkers who confuse us with their arguments. We do everything we can to avoid salespeople and we cringe at the thought of being sold.

When I ask people in workshops what a stereotypical salesperson sells, guess what they say? **Used cars!** Yes, to most of us, selling equates to selling used cars. Not a great model for professional selling.

I think it's useful to make a distinction between "Selfish Selling" and "Selfless Selling." Selfish Selling is where the attention is more on the needs of the salesperson and Selfless Selling is where the attention is more on the needs of the prospect.

We've already described some of the attributes of Selfish Selling. To this we could add talking too much, not listening, being self-serving, exaggeration and outright lying. Sound familiar?

We have this view of Selfish Selling because we've seen manifestations of it hundreds, if not thousands of times. There's also another side of Selfish Selling, where the salesperson virtually does nothing. They answer our questions (barely), don't know much about the product or service and don't seem to care if we buy or not. We often see this behavior in retail environments.

So it's no wonder that we have such a low opinion of selling!

Interestingly, Selfless Selling is also happening all the time and we have been involved in many, many Selfless Selling situations. But as our belief system views selling as selfish only, we don't recognize Selfless Selling as selling at all!

Do you see that? **We don't think of Selfless Selling as selling.** We just think of it as someone helping us buy. And in my definition, that's exactly what true selling or Selfless Selling is all about. Selling is about helping us buy something that is appropriate to our needs, not tricking us into buying something that is completely inappropriate to our needs.

Selfless Selling takes a whole different set of skills than Selfish Selling. When you make the distinction between the two you will find that it is a lot easier and a lot more fun to do Selfless Selling.

It's Where You're Coming From

In the chart below I outline some of the main distinctions between Selfish Selling and Selfless Selling. Note that it is not so much what you do that is different between these two selling approaches. What is different is where you're coming from. Sales techniques themselves are neutral. We'll discuss how to apply the Selfless Selling approach no matter what techniques you use.

Selfish Selling	Selfless Selling
Attention on getting the sale	Attention on helping the prospect
Being Manipulative	Being Empathetic
Talks a lot and doesn't listen	Ask questions and listens
Answers questions evasively	Answer questions directly
No clear results promised	Result is monetized
Little product/service knowledge	High product/service knowledge
Vague product/service presentation	Clear product/service presentation
Manipulative closing techniques	Makes professional recommendations
Only gives choice of yes or no	Give prospect choice of yeses
Breaks promises/false assurances	Keeps promises/honest assurances
Must make sale no matter what	It's OK not to make the sale (win-win)

Although at first glance, we would probably say, "I like the selfless side a lot better," there are many things conspiring to make our selling efforts fall into the first column.

Why is that?

The main reason we fall into Selfish Selling behaviors is because most people come from a place of scarcity. That is, we believe that if we don't make the sale we'll be out of money, out of work, out of a home, out of business. Oh, my God, we've got to do anything possible to get the sale!!! And we end up doing Selfish Selling even though we don't really want to. We think that's the only choice and that to be completely selfless when selling will result in us losing the sale.

But by engaging in Selfish Selling behaviors we experience other negative consequences. If we come from scarcity, we start doing things we're not very proud of. Because our behavior is selfish, we feel bad about what we did and at the same time we turn off our prospective clients. Our fear of rejection becomes real. The selling process becomes a struggle. We're caught between a rock and a hard place. Is it any wonder that most people don't like selling at all and do everything possible to avoid it?

So what is the way out? Do we make a conscious decision then to only engage in Selfless Selling behaviors? Sometimes, but the more common result is that we give up on selling altogether. We feel so bad engaging in Selfish Selling that we swear never to do it again. We make the decision to only talk to people who have called us and are ready to buy our services. We flip into "order taker role." We ask what people need and then if we can help them we hope we get the sale. But this is just another manifestation of Selfish Selling, isn't it? We're just playing it safe, not serving the prospect.

Now if you happen to be good at your profession and you have a strong work ethic and people talk about the work you do (and hopefully all of this is true) you will start to grow your business despite your resistance and avoidance of selling. **In many cases you will actually start to get better at the sales process in an organic way.** That is, you'll start to naturally ask better questions. You'll start to really listen. You'll start to recommend courses of action. You'll put your focus on helping people, not on just getting the sale.

But if asked if you were selling, you'd probably say you weren't! You were just helping the prospective client buy what was most appropriate for them. (But remember, that is my definition of Selfless Selling!)

Are you starting to see how mixed up we are about selling? We consider Selfish Selling to be "real selling" and Selfless Selling **not** to be selling. In fact, just the opposite is true. The only real selling is Selfless Selling and Selfish Selling really has nothing to do with selling. When we realize this we are free to learn the skills of selling, understanding that it's actually about helping people get what they want, not coercing them into doing what we want.

What this chapter is about is learning the distinctions of Selfless Selling. When you start to work consciously at Selfless Selling, some really great things happen. First, selling becomes a lot more fun, it actually becomes a pleasure. You start seeing your prospects as partners, not adversaries. You completely lose your fear of rejection. Prospects respond to you a whole lot better and want to work with you. Prospects look to you as a professional advisor, instead of as a salesperson. And the more you focus on how to help people, the more services you'll sell.

Let's look at these ten Selfless Selling skills one at a time:

1. Attention on helping the prospect

This might be thought of as a mindset or attitude skill. This is listed first because if you don't have this it will be virtually impossible to do the others. If all you are thinking about is making the sale, you are coming from a selfish, win-lose perspective. With Selfless Selling it doesn't mean you never think of making the sale, it means that what you think of first is serving the prospective client, helping them make a choice that is appropriate for them.

So you need to come to each sales situation with a complete sense of openness and discovery. Your only agenda is to determine if what they truly need matches with what you have to offer. And you are completely willing to forego the sale if there is not a match. With this kind of attitude, the prospect and you can relax and

just have a conversation that explores the possibilities.

At the beginning of the sales conversation there's nothing wrong with setting the agenda by stating your Core Marketing Message and your understanding of the purpose of the meeting.

So you might say something like:

> "What I do is help teams in complex environments work more productively and get more done. What I'd like to accomplish in this meeting is to learn more about your situation, explain more about what I do and the kind of results I've achieved and see if we might be able to work together."

This provides a natural transition to the next part of the sales conversation.

2. Being empathetic

Closely related to the attitude of having your attention on the needs of the prospect, is being empathetic and understanding. A selfish salesperson will often fake empathy, caring and interest. And you can fake it. But you'll start making decisions that go against the best interests of the prospect. You'll stretch the truth, manipulate facts and stop listening. No, you have to work intentionally at being caring, kind and patient at all steps in the selling process. Now this doesn't mean you won't have prospects who are manipulative, insincere, impatient and hard to work with.

I've found that a lot of empathy and caring go a long way. I've discovered that prospects who were hard to get along with often softened up considerably if I treated them with dignity and respect. They often turned into great clients that I produced profitable results with.

3. Asking questions and listening

This is undoubtedly the master skill of selling. And yet it is practiced so poorly. We ask poor questions and we don't really listen. One of the reasons we do this is we're not grounded in the first and second principles – "Attention on helping the prospect" and "Empathy." So if we start with that, and remember it during the conversation, our questions will be better and our listening will be deeper.

Questions That Don't Work

It might be useful to look at all the kinds of questions that don't work, that don't open the conversation and open possibilities in the selling process. Instead, these kind of questions tend to close things down.

Leading questions

This is where you're angling for a particular answer, especially regarding outcomes the salesperson would like to see. "You would like to double your sales this year wouldn't you?" Your prospect will feel trapped with such a question. It implies that if I don't want that, I lack ambition.

Sometimes a leading question can work to confirm information, as long as it's not

used heavy-handedly. "Your sales goal, as I remember, was to double your sales, correct?" Here you're simply confirming some information and making sure you are in agreement. It's a leading question because you already know the answer but it helps to forward the conversation without building resentment.

Closed-ended questions

Questions that can be answered by yes or no or by a basic fact are not so much bad as they are inefficient. Lots of closed-ended questions can make prospects feel like they are under the third degree. It's harder on you because you need to come up with so many questions. "Do you work in teams now? Are your teams effective? Are you happy with your team results?"

Instead, by using a simple open-ended question you'll get better information and the prospect will feel like they can communicate more freely. "Tell me a little about teams in your company and how they both work and don't work."

Why questions

Why questions presuppose that people really know the reason behind everything. And the truth is they often don't, so why questions often seem confronting and will frequently result in defensive responses. "Why do you set your teams up like that?" Of course, tone of voice and the context of the conversation might make some why questions perfectly acceptable. But you don't want to make your prospect feel uncomfortable and defensive. You can ask why questions with more tact: "The structure of your teams is interesting. Can you tell me how you came up with that approach?"

Thoughtless questions

These are questions you should probably know the answer to, have already asked in another way or that simply don't forward the conversation in any meaningful way. You don't want to waste the prospect's time, and questions that stray from the purpose of the conversation won't win you any points.

Questions That Work

A productive sales conversation is always built on good questions and deep listening. Let's look at these in more detail. There are several categories of questions: Past, Present & Problems, Implication, Future and Questioning Into.

Past, Present & Problems

These are questions that ask about the past, present and problems of the prospect. Generally they are open-ended questions about what they've done and what they are doing. They are also questions about what is working and what is not working. If you have a nice conversation about the past and present and never get to the problems, you've missed the most important information of all. After all, why would you be talking in the first place if they didn't have some concern, dissatisfaction, issue or problem they wanted resolved?

Sometimes you want to get to what's not working right away and sometimes you want to take some time to get to it. Again, it depends on the context of the situation and what you know before the conversation starts. For instance, if you get a call and

your prospect tells you the teamwork in her company is a mess and productivity is down, you already know the main problem and you can start asking questions about how things got that way and determine how serious the problem is.

But it's not unusual for some people to be protective of the problem. They might call to say they need someone for team development work and wondered if you were the right person. If you went into the sales conversation assuming they were just comparing team-building consultants, you might miss asking questions about problems altogether and get right into what you can do. Make no mistake, if you get a call for your services, there is a problem. And it's often bigger than they're admitting. And if you don't find out about it, you'll probably lose the sale.

Remember however, that often people won't admit to having problems, despite the symptoms. They might respond better to the words "issues, concerns and challenges" instead.

So past and present questions are much like a doctor making a diagnosis: Where does it hurt, how much does it hurt, how long has it been hurting and when you do this, does it hurt more?

Implication Questions

When you know where the pain is, you need to know what this pain is costing them and what the implications are if the pain continues. You can't skip over this. You can't assume you know. It's often a realization of the implications that triggered the call in the first place. For instance, someone might be able to put up with a pain in their leg. But when they notice that the area around their ankle starts to turn greenish they remember "gangrene" and "amputation," both implications of the pain, and they rush to the doctor pretty quickly.

So saying something like the following would be completely appropriate:

> "You really seem to be concerned about the lack of productivity in your teams. What's going to happen if things don't improve?"

Sometimes you only need one, good implication question like the one above to really get them thinking.

Future Questions

You might think of these as the opposite of implication questions. Implication questions ask "what if you don't act?" Future questions ask "What does improvement look like?" Now the interesting thing about future questions is that it takes a whole different kind of thinking from your prospect. When answering past, present and problems questions they are reporting on "what's so." When you ask a future question they may have not even considered the possibility of things actually working. They are focused more on the problem or the pain they are experiencing and the potential consequences.

You may have to wait longer to get answers to future questions. So be patient. They need to tap into a different part of their brain – the creative part – to answer your question.

"Tell me where you'd like to go with your teams if we could clear up the conflict amongst team members?"

By answering this question, your prospect now has a balanced perspective of the situation and so do you. You are both aware of the situation, the problems and implications as well as a potential future. This gives both of you a solid foundation to work from.

Questioning Into

One of the most important questioning skills is to "question into" the answers you receive. That is, when you get an answer, you don't want to necessarily take it at face value and go on to the next question. You want to go deeper into that answer by asking more questions.

For instance:
Prospect: "Our teams have never been less productive."

Questioning into: "What does that lack of productivity look like?"
Answer: "For one, people spend hours in meetings and come out with no clear plan of action."

Questioning into: "How else are the teams unproductive?
Answer: "Well that's really the main thing. Decisions don't get made despite all the time in meetings."

So now you've identified a problem that's much more specific than "lack of productivity." You see that they are having problems with making meetings work and making decisions. And now your questions can go more in that direction.

As you see, the whole issue of questions and listening is central to the success of the sales process. You're trying to see if you can work together but you can only do that if you learn more about their past, present, problems, implications and desired future. Any sales conversation that doesn't learn these key things will go nowhere, just as a doctor can't start prescribing if they haven't diagnosed correctly. These kinds of questions are the hallmark of Selfless Selling because they are all about discovering how you can best help the prospect.

Selfish Selling, on the other hand, uses manipulative questioning to get the prospect to do what you want them to do. But all this really does is build resistance, resentment and frustration. Sure, you might make the sale but you're going to have a lot of uncooperative clients.

4. Answer questions directly
(but don't get sidetracked)

Remember that a sales conversation is a two-way street. You probably won't be just asking questions and listening to answers. Your prospect will also be asking you questions. No problem, right? Wrong! It can be a big problem because you can get into the pitfall of telling too much too soon or prescribing before the diagnosis is complete. But you don't want to be evasive either. That's what selfish sales people do.

What you want to do is answer what you can answer as directly and as briefly as possible and then return to your questions. It's a matter of give and take.

Here's one scenario:

> **Question:** "How do you help teams improve productivity?"
> **Answer:** "Our first job is to find out exactly where the unproductivity lies. It could be in several areas such as meetings, direction & mission, communication skills or even internal conflict issues. It's usually a combination of those things. When we've isolated the culprits we use a variety of tools, from individual coaching to training sessions. But first I need to learn some more about what's going on with your teams. Can you give me more of a picture of what actually happens in meetings?"

Do you see how it would be a big mistake to launch into exactly how coaching sessions and trainings are conducted? That would be a little like describing the operation before you knew one was needed. So do answer their questions. Be clear and direct and then get back to your questions.

5. Monetize problems and solutions

One of the most effective things to do during the selling conversation is to attach a dollar value to the problem your prospect wants solved. Often Independent Professionals are selling intangible services. By monetizing the value of these services it becomes crystal clear what solving that problem is worth to the prospect.

Let me give you a few examples.

Attrition Problems

The company is experiencing a high attrition rate. Employees are leaving and the prospect needs to keep hiring. You ask what the cost of attrition in the company is. You don't accept a general answer. You ask specific questions like the following and write the answer down on a piece of paper. You want to get ball park figures and be pretty conservative.

> OK, what is the percentage of attrition you are experiencing yearly?
>
> What does that work out to in the number of employees you need to replace in a year?
>
> And what is the average cost to replace a new employee?
>
> And what do you figure it costs in terms of training them and getting them up to speed and being productive?
>
> Great. So we have about 500 employees a year that you need to replace at an average cost of $30,000 in replacement and training costs. That equals Fifteen Million dollars per year as the current cost of attrition.
>
> What we've been able to do with companies like yours is reduce attrition by a minimum of 25%. That would mean a conservative savings to you of $3.75 million per year.
>
> Now I'm not sure that saving $3.75 million is a high priority for you. This will take some hard work and commitment on your part. Do you think this is worth pursuing?

What you are doing here is having the prospect give you the data from which you make a simple calculation that shows what the problem is costing. Then you throw it back on them and ask them if they are committed to solving the problem.

OK, here's another one for a career coach.

> You've said that you've been struggling to achieve some very important goals but things keep getting bogged down. Do you mind if we take a hard look at what that is costing you?
>
> OK, you want to move forward in your career. You know you could be earning more money. What do you think you should be earning every year.
>
> OK, that's about $20,000 more than you're making now. Over five years that's $100,000.
>
> What would you do with that extra $100,000?
>
> You want to be able to take a big overseas vacation every year. Where do you want to go? Why do you want to go there? What would it mean to you to achieve this goal?
>
> Great. In the past five years of working with people as a career coach I've helped over 70 people increase their income by 30% or more. I think your $20,000 per year increase is actually pretty conservative.
>
> This will take some commitment on your part but if you're willing to go for it, I'm willing to take you on as a client and I promise to attend your going away party for your first big vacation! When do you want to start?

Here the coach is both tapping into the financial difference her services will deliver and the dreams the financial goals will help fulfill.

6. High product/service knowledge

If you are selling professional services to improve the productivity of teams, you'd better really know your stuff. You'd better know all the things that go wrong with teams; the symptoms of dysfunctional teams; what productive teams look like as well as knowing what kinds of interventions work to turn unproductive teams into productive teams. But if your prospective clients don't know that you know all of this, what good does it do you?

There are a few ways that you can communicate that knowledge. The first is through your marketing materials (either printed on your web site). They should outline all of the above and more. Hopefully your prospect will look at your materials and see that you know your stuff. The other way is through the questions that you ask. That's right, just by asking intelligent, focused question you will demonstrate what you know. After all, someone who didn't know much about teams wouldn't be able to ask all those intelligent, penetrating questions would they?

A third way is to actually provide consulting during the sales conversation. I want you to imagine that when you sit down with your prospective client for your

first face-to-face sales meeting that they write out and hand you a check for $1,000. You really haven't made the sale yet but they are already paying you. What would you do? Wouldn't you do exactly as I've been saying so far? Wouldn't you start asking questions and digging in to find the solution? But in the course of the conversation wouldn't you share some information as well?

You're not solving the problem yet with this information but you're sharing some of what you know. For instance, if you're a team building consultant and you've asked a lot of the questions about how their teams are working, you might then share a strategy you use to make teams work more effectively:

> "What you're saying about your teams is interesting because so many managers face exactly the same problems. The team is created but they are not clear on objectives and roles. What I do when working with teams is to make sure three things are crystal clear – one, what the purpose of the team is, what the short and long-term objectives are and what the ground rules are for working together. It sounds simple, but when we did this with a recent team I was brought in to help they went from being very unproductive to the most productive team in the division. Now tell me a little more about..."

By sharing a little of your knowledge and the kind of situations you've addressed through a specific story you are going to get more buy-in from the prospect. Then you can return to the questions. After they have answered a number of questions you can insert another story. By going back and forth like this the sales conversation becomes more balanced. There is give and take. You're getting the information you need and you're building a case for your approach at the same time.

The other way to communicate what you know is through clear product/service presentations, which is our next topic.

7. Clear product/service presentation

Can you make a case for your services once you've learned what the prospect needs? Can you be clear, articulate, logical and persuasive? Many sales are made without a presentation but it sure doesn't hurt to have the skills and abilities to make one if called upon to do so.

When do you need to make a presentation? There are many circumstances.

Preliminary Presentation

What if they won't let you talk to a decision maker before you've given a sales presentation? It does happen. They think they want to know what you do, not how you can help them, and pick you like they pick a computer system.

Try to make it an interactive presentation in which you actually get some valuable information from those in attendance. By discussing the various symptoms of unproductive teams you can then ask the group to score themselves in each of the areas. Which areas are they having the most difficulty with? You can do the same with implications and future possibilities, all without going into much detail

about your solutions. Just because they want a presentation doesn't mean you can prescribe without diagnosing first.

Presentation After the Sales Conversation

Once you've asked everything you can ask in the sales conversation, and you now have a good idea of what you can offer as a solution, you may want/need to return to make a presentation. This is before you have prepared a proposal. The purpose of this presentation is to outline what you have learned, give an overview of the objectives the client wants to accomplish and give a snapshot of what you will do for the client. As you'll learn in Chapter 21 on Proposals, outlining the objectives, value and measures of success are just as, if not more important than explaining what you will do. And for goodness sake, never give a presentation that only explains what you will do. Remember, people are more interested in knowing what they will get than what you will do.

After this presentation your aim is to get conceptual agreement on the situation, objectives and solution. You want to get to a point that they say, "yes, this is what we want. We want to work with you." The only thing not settled is the price and the final details.

By the way, this is not where you want to give the price. Wait until you have prepared a proposal.

Proposal Presentation

This would come after one or more sales conversations in which you determined the prospect's problems, implications and desired future. It would come after conceptual agreement on the issues they would like to resolve and it would come after agreement on desired outcomes and measures of success.

The proposal presentation would sum up what you've learned, the outcomes desired and give an overview of the interventions you would recommend. It needs to be delivered with confidence and present a solid case for your approach. This presentation would be delivered after you had prepared a written proposal. In many cases it will simply be a summary of the proposal and will come with a final price tag.

8. Make professional recommendations

If you are a selfish salesperson, any solution will do. As long as they say yes. Resorting to complex and manipulative closing techniques only creates resistance in the buyer. In Selfless Selling you are only going to make recommendations that have a high probability of working. Your recommendations also have to take into account their current needs, their motivation, their company culture and their budget. There are a lot of things to consider. Nevertheless you don't want to waffle about your recommendations. You want to make a recommendation that you can stand behind 100% and that has a high probability of success.

Imagine speaking with your doctor and discussing the various options for treating your illness. After giving you two or three options the doctor says. "So those are the options; you choose what you want to do." Would that leave you feeling

confident and assured that the right course treatment would be followed? Wouldn't you prefer they give you the options and then recommend what they thought was best, based on your situation?

Tell prospects:

> "I can help you. Based on everything you've told me I can help you increase the productivity of your teams, improve meetings and help get things back on track. What I recommend is that we start with the pilot program first and then proceed to train the managers in XYZ division."

Your next step may be a proposal that outlines your findings and recommendations.

But in the proposal there is nothing wrong with offering a choice of yeses.

9. Give prospect a choice of yeses

A choice of yeses is always preferable to yes or no. After all, you can recommend a 3-part implementation plan. They can commit to part 1 or part 1 and 2 or all three parts. You can outline the benefits of each. If you only give them the choice of all three parts you back them into a corner. And when people feel cornered, the downside of making the wrong choice seems worse than not making a choice at all.

By giving choices at several different levels, people feel they have some power in the matter. The result is that they will choose the full program more often than if given a choice of yes or no. And if they choose a partial program, you still have the opportunity to do the full program once you have proven yourself.

10. Keep your promises

Keeping your word is not a problem if you haven't promised the sun, moon and stars. But isn't that what selfish salespeople do? They promise the world because they're afraid that if they don't, they'll lose the sale. So they over-promise and under-deliver. The result is resentment and distrust of selling and salespeople.

Make your promises carefully. And deliver to exceed that promise. Very simple to say but often quite hard to do. One way to increase the chances of delivering on your promise is to give a guarantee of performance. You know there will be consequences if you don't deliver. The promise is no longer implicit but explicit. A guarantee actually protects both parties. It protects the buyer by having some recourse if you don't deliver and it protects you two ways – you're more likely to deliver on an explicit promise and you're less likely to "give away the farm" by trying to satisfy the client when the expectations are unclear.

There are always going to be prospects who take advantage of you. There will always be people who are never satisfied no matter what, but these people are usually the exceptions, not the rule.

11. It's OK not to make the sale (win-win)

All transactions need to be win-win. When it comes right down to it, a selfless salesperson would prefer not to make the sale if it is either not appropriate for the

client or not appropriate for the sales person. If you pay attention to these principles and practices from the very first conversation, it's usually going to be clear whether or not it makes sense to take the next step.

Selling becomes very hard indeed if you're meeting with prospects you can't really help or who won't let you help them. It's also hard if you're trying to make a sale happen and you want it to move faster than it should. And the whole process becomes painful if you let yourself slip into a Selfish Selling mode.

But if you meet with the right people, use the above skills to find out if you can work together, let the sales process take as long as necessary while maintaining an attitude of selflessness, you'll find that selling becomes a whole lot easier.

Mastering Professional Selling

Professional selling, Selfless Selling needs preparation. Selling is a performance skill. It is something you engage in often, not just once in awhile like creating a brochure or developing a promotional campaign. Every time someone asks what you do you have entered into a selling conversation. Every time you receive a call, make a call, meet with a client or recommend a course of action, you are engaged in selling.

There is no single skill that will contribute to a higher income than selling skills. If you can turn a large percentage of prospective clients into paying clients, you can start to put your attention and energy where it really matters – on performing the work.

If you don't understand and then commit to understanding the principles of Selfless Selling, you'll automatically fall into some form of Selfish Selling. Many default to no selling at all or what's called "order taking."

Some other insider selling secrets

Go slow, not fast. People in a rush don't build relationships. Even if people insist on getting together with me, I slow things down and get to know them first. This builds trust and more successful working relationships.

Admit you don't know. You can't know everything. But if you try to fake it, your prospects will see through you pretty quickly. Let them know you'll get back to them with that information.

Have a sense of humor. If a sales appointment is grim and serious, you know you're not building rapport and trust. Realize that there's humor in everything. If I end up laughing with a prospect, I know the appointment is going in the right direction.

Think of yourself as an "assistant buyer," not a sales person. Be a partner in the process. You're looking to see if you can work together. You're not an adversary who wins if you make the sale. You only win if you build agreement step by step.

Know where the buyer is on the "sales teeter-totter." If they're far to the left, it's a NO, if far to the right, it's a YES. If they're to the left they need a lot more education, questions and listening. If they're more to the right, they need to know what you're going to do and what they can expect.

Maintain a balance in giving and receiving information. If you tell them everything, they have the advantage. If they tell you everything, you have the advantage. In both cases the situation is unbalanced and it's hard to come to closure. Make sure you both get and give information in a sales appointment.

Welcome objections and questions. This shows your prospect is interested and wants to know more. It shows they're an intelligent, qualified buyer. Answer objections thoughtfully and build your case with conviction.

Ask them what they'd like to do next. Once you've asked all the questions, determined the objectives and outlined the options, ask them what they'd like to do. It's a very low-pressure way to close. If they say they need to think about things more, you may need to ask more questions or provide more information. But they just might say they want to get started right away!

Action Plan – The Professional Selling Process

1. **The alpha and omega of sales success is based on good questioning as outlined in the material above.** Everything else revolves around this. So take some time to list every single question you can think of to ask a prospective client. Leave no stone unturned.
2. **Actually put these questions in writing.** If you only have five or six questions, you don't get it. Come up with 25 to 50. Seriously. You won't ask all of these, but you'll be prepared to. Then prioritize the questions.
3. **When you are faced with a high stakes selling situation, review all the material in this session and think out, even visualize your strategy step-by-step.** Plan what you'll say first and what questions you'll ask. Plan what you'll say about your service and plan what you'll say to close or move the process to the next level (such as preparing a proposal).

Books and Resources on Selling

Let's Get Real – Mahan Khalsa

Selling With Integrity - Sharon Drew Morgen

Non-Manipulative Selling – Alessandra and Wexler

Personal Selling Strategies for Consultants and Professionals – Richard K. Carlson

Stop Selling – Start Partnering – Larry Wilson

Sales Without the Sucker Punch - An e-book by Len Foley

These and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 18

Making Appointments with Qualified Prospects

Turning Interest into Appointments

When I ask most InfoGurus where they get new business, the universal answer is: "by word-of-mouth." Their name is passed on from a satisfied client to a potential client who then calls them. In that situation it's not too hard to get an appointment and convert the prospect into a client.

But professionals often have tremendous difficulty with converting prospects who don't call them first. The thought of making a call and trying to set an appointment, let alone a sale, fills them with dread. And their expectations are often self-fulfilling. The call, even if it was referred by an associate, turns into nothing. The prospect tells them they aren't interested or asks them to send a brochure. Follow-ups go nowhere. Calls go unreturned. And they give up. Sound familiar?

I'm going to give you the formula for converting that telephone call into a qualified prospect, eager to learn how you can help them. It takes more than a silver tongue. It takes preparation, practice and patience to do it successfully. And first you need to understand the dynamics of the telephone calling process.

Different Categories of Calls

All calls are not created equal. That is, depending on the context of the call, it will be easier or harder to get an appointment or make a sale. There are essentially 3 telephone situations where you have the opportunity to turn that call into an appointment or a sale.

A call-in

This is where someone calls you from either a lead or as a result of your marketing. These calls can range from very hot to very cold but they have one thing in common: They called you, so it automatically makes the call easier than if you called them. Nevertheless, you need to have a strategy for converting these calls into sales. They are not automatic.

Call-ins are generated by:

- A referral from a client or associate
- Someone who attended a talk you gave

- Someone you met through networking
- A mailing you sent out
- Your web site
- Advertising, yellow pages, etc.

A warm call

This is where you have a lead or you have a person that is expecting your call. Because you have some kind of previous connection, the call is a lot easier than a cold call, but again, it's not a slam-dunk. These calls require a carefully prepared strategy.

Warm calls are generated from:

- A referral from a client or associate
- Someone you've met through networking
- Someone you've met at a presentation you gave
- A follow-up call to a call-in

A cold call

These calls are generally the hardest because you are perceived as a stranger. No one likes to be called by a stranger. Nevertheless it is valuable to have a strategy for these kind of calls because there are some potential clients you will simply never reach unless you make a cold call.

Cold calls are generated by calling from:

- A mailing/call list
- An association list
- A notice you saw in the paper
- Something you saw on the web
- A help wanted ad

Some Call Psychology

It's useful to remember some truisms about making calls.

- **People don't like to be sold but people like to buy.** People only feel they have the opportunity to buy if they understand what's in it for them. They will only understand what's in it for them if you set the tone for the call by stating an immediate benefit.
- **Most people you call will fit the model of the "bell shaped curve."** That is, very few will accept you with open arms and very few will just hang up on you. Most will give you a moment of their time if your approach is professional.
- **On your calls, sound and act like a "trusted advisor" would.** Just imagine the conversations you have with your most trusted advisor. They may recommend certain actions but they certainly won't come across like most salespeople do. They listen more than they talk.

- **Nothing is more important than being conversational, that is, natural on the phone.** What sinks most phone calls is not the words but the way we come across. Being stiff and scripted is the very worst. But being unprepared and rambling is almost as bad.
- **It's more what you ask than what you say.** If you get the person on the other end of the line to talk, you're halfway there. You'll only get people to talk if you ask good questions.
- **Ask questions that hit at the gut level.** If you only ask "head" questions, they will respond only with their head. People have concerns, dissatisfaction, worries, and troubles. Ask "What makes you... pace the room, stay up at night, work later than you should, lose your temper, etc.
- **Demonstrate that you're listening and hearing by feeding back what you hear through paraphrasing the answers and comments of your prospect.** Prospect: "I'm really frustrated by our turnover." You: "It sounds as if you're at a loss about what to do." This kind of paraphrasing demonstrates clearly that you have really understood their situation.
- **Closing is not the hardest part of telephone selling.** It's really the easiest if you do all the previous parts correctly. Closing is usually just a matter of summing things up and agreeing on what to do next.
- **Ask for a commitment to work with you.** Once you have learned their concerns and needs and understand what would help them, ask: If I could help you solve that concern, would you consider working with me? If they say "yes," then work out the next steps to take.
- **You won't have to work much on objections if you do it right the first time.** Many sales courses teach "recovery techniques." But you won't have much recovering to do if you get their attention, stay conversational, ask questions and close appropriately.

The Four Master Skills of Calling

No matter what kind of call you're making, there are four "master skills" you can apply to every type of call. Neglect these at your peril. It is insanity to "just wing it" on calls. You need to understand what works and what does not work and why. Only then can you expect to succeed at making more appointments and sales by phone.

These Master Skills are:

- Opening
- Qualification
- Listening
- Closing

Opening: Clearly Communicate Your Core Solution

Before you even get on the phone, you must be able to clearly express exactly how you help your clients. You build trust when you state your business solution in clear, specific terms. Too many professionals say something like, "I do process improvement for all kinds of companies, do you need any help with that?" This is much too general. You might think that by casting a wide net you'll increase your chances. However, if you are more focused, you'll actually get a much better response. By saying, "We can improve cycle time in high-tech manufacturing environments by a minimum of 20%. Is that what you're looking for?" You build trust by getting right to the point and speaking about results that mean something to your prospect.

Qualification: Don't Try to Convince Prospects – Reject Them First

Many professionals put too much effort into trying to convince their prospects that they are experienced, intelligent and have the right services. But doing this with a prospect who is not qualified is a total waste of time. A qualified prospect has the need, desire and means to get help with solving their business problems. So the faster you reject inappropriate prospects, the more time you can spend on learning how you can help qualified ones. Adopt the attitude that you can only work with a few select clients. By telling those you call exactly what solution you provide, inappropriate clients actually disqualify themselves.

Listening: Listening Yourself Into an Appointment

It's a much more natural, stress-free process to "listen yourself" into an appointment or a sale than to talk yourself into one. Your first task is to learn where the prospect is coming from, what their problem is and how motivated they are to use your kind of service. You're only going to learn this if you ask the right questions and really listen. But listening doesn't stop there. You want to ask the kind of open-ended questions that get prospective clients to really open up and tell you everything about their situation and problems. If they see you as a trusted advisor who really listens and doesn't jump in too quickly with solutions, they are much more likely to invite you for an appointment to learn more. Talking too much has been called "salesperson's disease" and tends to work against you, especially when selling professional services.

Closing: Get the Prospect to Ask for the Appointment

Nobody likes a pushy salesperson. And when you're making calls you can be seen that way, especially if you keep trying to close for the appointment too soon. The classic, "I have some ideas that will save you time and money and I'd like to show you how. Are you free Thursday afternoon or Friday Morning?" simply doesn't work anymore (Perhaps it never worked!) Instead, you need to develop so much rapport, trust and credibility in your telephone call that they turn around and ask you what they should do next.

How I Make it Work

After a very involved discussion with a client about turning telephone conversations into appointments, I remembered once again what an art this can be.

You know the scenario: You have a "live" prospective client on the line, but by the end of the call, for no discernible reason, you haven't set up an appointment, let alone turned them into a client. They ask you to mail materials or say they'll look at your web site and get back to you. **Not only do they not call back, they won't even return your calls!**

Depression ensues and you have the nagging thought that a regular "9 to 5" wouldn't be such a bad idea right now!

I was trying to remember when this turned around for me. I can't recall if it was one big realization or simply a slow improvement in my telephone skills over time. But something definitely happened and now when I make a call or receive a call it turns into a client close to 100% of the time.

Many years ago, when I was a member of the San Francisco Chamber of Commerce, I had assembled a mailing list of several potential chamber members to see if they could use my services. I wrote a one-page letter and followed up by phone a few days later. I remember, even today, the queasy feeling in my stomach as I picked up the phone.

One of the first people I reached was a corporate psychologist. I had prepared my opening "pitch" and I fumbled through it...

> "Hi, this is Robert Middleton of Action Plan Marketing. I sent you a letter last week about my services. I work with small professional businesses to help them improve their marketing. I really have no idea if you are currently looking for help in this area, but I wanted to follow-up and see if there might be a connection."

Well, perhaps I lucked out that day. I had caught this corporate psychologist at a good time and he started to talk. And talk. And talk. And I started to ask him questions and really listen. I don't think I could have "sold" him anything if I had tried. I just clung on to the phone and listened as hard as I could.

At the end of half an hour or so he had pretty much told me the story of his business and his struggles with marketing. And then I said something that has served me well for many years: "It sounds as if I can help you. What I suggest is we set up a meeting and discuss exactly how in more detail." He was more than willing and, ultimately, I turned that meeting into a very good consulting project.

What I now do on the phone (although most people call me) is really pretty much the same and it works just as well.

I unfailingly do the following five things:

1. I ask a lot of questions and really listen – with no agenda
2. I don't pitch my services or try to convince them of anything. After all, I don't know if I can help them yet.
3. When they ask me a question, I answer briefly and then always ask them another question until I really understand them.
4. I try to learn about their objectives, not just their current situation. I want to know if they have a vision that things can be different and that they're open to getting assistance.

5. Only when I'm certain I can help them and that they are open to that help, do I suggest we get together for an appointment.

I know this sounds too simple, but you can't argue with success! If turning phone calls into clients isn't working for you, I suggest you give these five steps a try as well.

Putting it All Together

We're now going to take the principles above and walk you through a typical scenario where the goal is to make an appointment with a qualified prospect.

Let's assume that you're calling a potential client from a semi-warm lead. You might think of this as the "middle ground" of sales calls. It's much easier if a motivated, referred prospect calls you and it's much harder if you make a cold call to someone you know nothing about.

When calling on a semi-warm lead, you have a name and some information about the company and their situation and problem. The referral comes from an associate but the prospect may not be expecting your call. You need to make contact, create rapport, establish your credibility and create momentum in only a few seconds. Impossible? Not at all! Here's what you need to do:

First words count the most

The first words out of your mouth need to create a connection with your referral as well as powerfully positioning your business. You want to get to the point very fast. Remember, when receiving a call, the first impulse is to get rid of you as quickly as possible so they can get back to their work. You can only override that impulse by immediately giving them something of value as well as giving them a reason to continue the conversation. To demonstrate, let's create a fictional dialogue between Susan, the professional, and Linda, the prospective client.

> "Hello Linda, this is Susan Carter, Tom North asked me to give you a call. Tom mentioned that you were the project manager for the Lightning Modem project. I have a track record of improving cycle time in high-tech manufacturing environments by a minimum of 20% and Tom suggested I learn a little more about your project. By the way, is this a good time to talk for a moment?"

Notice that Susan, our intrepid consultant, is not selling anything yet. She simply established her connection to her referral source, communicated her credibility with her positioning statement and opened the possibility of learning more about Linda's situation. She's also been specific enough that if Linda has no need whatsoever for improving cycle time, she'll probably let Susan know. So how likely is Linda to respond to this opening? It depends, but if what she says connects at some level, she's likely to ask a question...

Re-position but don't sell

> Linda: "Uh, well the project is coming along OK, what is it that you do again Susan?"

Because Susan is not trying to sell anything yet ("Do you need any process improvement services?"), Linda is less likely to turn Susan off right away.

Linda's actually giving Susan another chance to position herself. So she needs to keep that focus and then use the opportunity to get the conversation started:

> "I've worked with companies like Intel and HP to increase cycle time by a minimum of 20% in high-tech projects similar to yours. I have no idea if that's a concern to you. You may be 100% on time and on budget but Tom felt it might be useful if we talked. I understand you'd been discussing some of the challenges of the project. But he didn't tell me a lot."

Now about the only thing Linda can do here is tell Susan that the project is 100% on track (fat chance) or start revealing some of her issues with the project. Susan's even given Linda a chance to opt out if everything's under control. Notice that Susan is being very soft-sell here but nevertheless has added a bit more credibility to her positioning by mentioning client companies. She isn't suggesting any specific solution, she's gently probing to see if Linda has a problem she's willing to talk about.

It's yours to lose

So let's assume this approach works with Linda. She starts to open up and tell Susan a bit what's going on.

> "Well, yes, when I was talking to Tom last week I mentioned that things were going pretty well but that it looked like we probably wouldn't meet our deadline. It's kind of frustrating because everyone is very dedicated. The communication is great, so I'm not sure if we've set unrealistic goals or something else is off."

When a prospective client shares something like this, you're halfway home. It's really "yours to lose" at this point. You know you have a motivated prospect with a problem. But you have to learn even more to see if you can help them or not. This is not the time to turn on the hard-sell and start trying to convince them that you can solve their problem. It's not even time to try to close for an appointment.

Get permission to probe

Susan is going to have the most success if she continues slowly but deliberately:

> "Linda, what you're saying is very familiar to me. It might be unrealistic goals but there's a good chance it's something else. Do you mind if I ask you a few questions?"

This is where Susan puts on her diagnostic hat and starts to ask more specific technical questions. And it's through these questions that Linda becomes persuaded that Susan knows her stuff. If Susan asks completely generic questions and then tries to push for an appointment, she'll likely get a brush-off.

> "Well, why don't you send me a brochure. I'll show it to my manager and we'll get back to you if we're interested."

Instead, she's very diagnostic, without any agenda. Being very understanding of Linda's situation, it's more likely that Linda will want to know more.

Setting up for the appointment

After numerous questions that help to clarify the problem, Susan might wrap up something like this:

> "Linda, from everything you've told me, it sounds like there may be some major glitches in the reporting system. This is very common. In a project I was involved with at Cisco this kept pushing the schedule back. It wasn't obvious at first, but ultimately it made all the difference. When we made the necessary changes, they started making their deadlines every time. Of course I can't be 100% sure if this is what will work for you, I'd have to know a little more and talk to some of your people first."

Susan has accomplished a few things here. Most importantly, she's identified a potential culprit and given a similar instance where she helped solve this kind of problem. Then by saying she needs to know more, she sets up the opportunity for the appointment. Notice that she hasn't spent one second pitching her services. Besides asking good questions, she's peppered the conversation with a comment here or story there about a past client:

> "The work you've done on improving communication is great. We did a similar thing at HP when the engineers wouldn't talk to marketing. It's amazing what can happen when people just start talking to each other, isn't it?"

Through this kind of conversation it becomes obvious to Linda that Susan can help. She doesn't know much about Susan's services yet or exactly how Susan starts working with clients, so this is likely to be Linda's next question.

Creating a commitment for action

> "Well how do you work Susan? It sounds like you might be able to help. What do you usually do first?"

This is exactly the response you're going for. Linda is asking Susan to ask for the appointment. Susan now runs with the ball:

> "Linda what I usually do next is set up a time to meet with you and continue this conversation to understand your situation even better and to see if I can really help. It's actually best if I can meet with you and other key players in the project. Who would that be?"

Smart move Susan. You want to know who else is involved in making the decision to hire you.

When you've found out, you continue,

> "I'd like everyone who attends the meeting to fill out a brief questionnaire. It's a simple form on my web site. It will help me get a better idea of the situation so we can move forward more quickly."

Great strategy don't you think? Susan accomplished several things here. One, she gets more valuable information before the meeting that she can build on. Two, she gets buy-in and participation from the prospective client ahead of time. This will warm up everyone before the meeting even starts. And three, she directs everyone to her web site where she has several case studies of similar projects outlined. That builds her credibility even more.

Never Beg for Business Again

The only thing left to do is set the date and time of the meeting. If you follow this appointment-setting strategy, you'll accomplish several things. You'll never again have to feel you're begging for business. You'll start to feel more like the professional you really are, an expert who doesn't accept every client but only the ones you can really help.

You'll also shorten the selling cycle because you're meeting with qualified, motivated prospects who are prepared to work with you from the very first meeting. Finally, because they'll see you as a listener, not a pusher, they'll be more likely to open up and give you the information you really need to help them. Start following this appointment-setting strategy and I guarantee you'll start converting more prospects into qualified appointments.

Action Plan – Making Appointments

The first thing you need to do is understand the four master skills of telephone selling and then use them to prepare and practice before you make a call.

1. **Opening** – What is your core solution? How are you going to use it in your opening? How are you going to transition from the solution to starting the conversation?
2. **Qualifying** – What questions are you going to ask to learn if they are a good potential client for you? How can you phrase the questions so that you come across powerfully, not weakly?
3. **Listening** – What are all the questions you can ask to learn about your prospect's business, their situation, their problems and their desired objectives?
4. **Closing** – How can you sum things up so that they ask you what to do next? How can you make your recommendation for an appointment sound like an opportunity for the prospect?

Create a call plan for a specific prospect. Simply identify someone who has the possibility of being a client and plan out the steps using the outline above. Write it out by hand or on the computer. Once you've created the basic plan, think it through. Ask what questions or concerns might come up. Then make the call and do the best you can. Finally, review how the call went and think what you could do differently next time. If you do this for several calls, your "hit rate" will go up dramatically.

Books and Resources on Setting Appointments

Selling to Vito – Anthony Parinello

The Power to Get In – Michael Boylan

These and other books can be found online in the Action Plan Marketing Bookstore.

Notes

Chapter 19

Negotiation and Closing

Bumps in the Selling Process

OK, you've come a long way as an InfoGuru. You've marketed yourself successfully. You set up an appointment and met with your prospective client. Things are looking great but this is often where the difficult part starts. Are any of the following familiar to you?

- You have a meeting but you realize the person you're meeting with is not the "economic buyer."
- No matter how hard you try you can't get access to the economic buyer.
- They keep asking you for a proposal but fail to give you enough information to do so.
- You seem to be in agreement and are close to moving forward but they fail to return any of your phone calls.
- They like what you have to offer but they balk at price and try to get you to quote them a much lower fee.

Creating a Foundation for Selling

What's going on here? In the face of these kinds of actions you may begin to lose your confidence and feel you're not such an InfoGuru after all. You've done everything right but you can't seem to make headway and close the deal. What do you need to do to get them eating out of your hands?

Ask yourself these questions:

- Is your positioning clear? Are you focused on solving problems and providing solutions to a very specific target market?
- Are your marketing materials (or web site) both clear and appropriate for your target market? Do they tell the story they need to tell? Do they look professional?
- How did your prospective client find out about you? From a talk, from your web site, responding to an article or from your eZine?

- What kind of questions did your prospective client ask you in your first phone appointment? Were they interested in a solution or did they seem to focus more on your fees and your process?
- What questions did you ask during this first conversation? Did you feel them out, find out their problems, determine their desired future?
- When you met in person did they meet with you under favorable conditions? Did the decision-makers show up or were they information gatherers?

The point I'm making here is that the selling process rests on the foundation of the marketing you've done. The aim of InfoGuru Marketing is to present such a credible identity, to interact with such professionalism and confidence that there is very little resistance.

When we get a call from a prospect, especially when starting our business, we get so excited we think they're already a client. But that's not the case. The first part of the selling process, as we discussed, is to first have attention on whether or not we can help this client, not to **assume** we can help them. If we do that we'll make a lot of mistakes.

You first need to learn if you can help this prospect or not. Feel them out, always asking yourself if it makes sense to pursue things further. There's no hurry. After all, if they need you and you have what they need, there won't be a problem.

What are some things to watch out for?

- They won't give you much information but remain vague.
- They don't want to meet with you but want you to send them more information.
- They insist on asking you all the questions but give very little information themselves.
- They waffle when you ask if other people will be involved in this project (i.e., who is the decision maker).
- They act very enthusiastically and never seem to have a problem.
- They insist you can help them, even when it's not your specialty.

Qualify Your Prospects

You'll avoid the behavior above if you do the following:

- First, ask them how you can help them. Try to get at a problem.
- If they first ask what you do, answer very briefly and turn the question back to them.
- Let them know you need to know more about their situation before you can explain what you will do for them.
- If they evade your questions, press a little harder. Ask again. You need to know and you don't want to waste your time.

- Ask how the process works in their company when they bring in an advisor. If they really can't tell you, they're not a buyer.
- If they tell over the phone that they want a proposal, always tell them no, you have nothing to base it on. You need to meet first.

Now if you do this kind of thing, you'll blow unqualified clients out of the water pretty quickly. You can get back to other more important things. You never want to seem desperate. You don't have to. Besides, it will almost always backfire. If you have a smart, qualified buyer on the other end of the line you'll soon know and you're more likely to set up an appointment under favorable conditions. And you'll have a good chance of getting the project.

The point is that 90% or more of problems in dealing with prospective clients can be resolved by screening them out in the first place. If you waste your time by trying to sell to everyone who calls, you'll wear yourself out and get discouraged.

Action Plan

1. Make sure all your marketing messages and materials are up to snuff so that you're attracting the right kind of clients
2. On the phone call spend more time getting them to sell you on the fact that they need you instead of you selling them on the idea of how great you are.
3. Don't do anything prematurely: Information that doesn't move things forward, meetings without a clear agenda, proposals without clear objectives.

Getting to the Economic Buyer

It's perfectly legitimate that someone other than the economic buyer gives you a call. The economic buyer may simply be delegating. They could be a very good potential client. It's just that the person making the call is not the one making the ultimate decision to hire you. And if you only meet and talk with them, you usually won't get very far.

When you've determined who your caller is and what their role is, you can proceed. Your first task is to get to the economic buyer. You don't have to do anything tricky or deceitful or brilliant to do this. You simply need to be prepared and tell them how you work.

> "This is how I work. Before I can give you a proposal or even tell you for sure if I can help you, I'll also need to meet with Mr. X. to determine your objectives. From there I can prepare a proposal if it makes sense. Is there any other information you need from me before we can set this up?"

You understand, that in many respects, your caller is simply seeking information. Perhaps he's calling three or four people like you. It's legitimate that they know your background and track record and approach to working with clients. And it's fine to give them that information. But don't give them so much that they decide not to use your services. Only together should you come to that conclusion.

If you have a very good web site with articles and services and background information on you, that's all they may need. If you don't have that, then send more printed information that answers these concerns. It also doesn't hurt to set up a phone meeting once they have the materials, to answer any other questions.

> "OK, let me send you the background information on me and my firm. It will go out today and should arrive by Wednesday. Can we set up a brief time to talk on Thursday to go over any questions you may have? Great. Let's look at our calendars."

Such an approach eliminates phone tag. If they are not available when you call and don't return your calls, let go of it. They either found someone else they liked better or are so disorganized you don't want to do business with them. Don't obsess about it.

But what if the "information gatherer" insists on a meeting and a proposal without access to the economic buyer? Fuggedaboudit! If this is the way they do business, you're going to hit some major roadblocks. You need to have a face-to-face with the person who makes decisions. Period.

Action Plan

1. Give the information-gatherer what they need once you determine they are empowered by the economic buyer.
2. Stick by your guns and insist on meeting with the economic buyer.

Closing the Deal

In the ideal scenario, the deal is closed before you give them the proposal. The only thing you have not agreed upon is exactly what you'll do and what it will cost. Many think that those two points are the crux of the matter. They're not. The crux of the matter is whether they can tell you the objectives they want to meet and whether or not you can meet those objectives.

It's not about what you do. It's about the result you produce. And if you're meeting with someone who is completely focused on process and how-tos, you're going to have a rough time.

So make sure you're completely focused on getting that information about their objectives. If you can meet those objectives, get a sense of the value of the project to them. Only then do you have what you need to put together a credible proposal.

During this whole process you're trying to learn what they really need. If you are building agreement in this direction one step at a time, you're likely to get the project. A buyer responds to your interest, knowledge, commitment and confidence more than they do to a long list of how-tos. You don't need to get into that to close.

> "To sum things up, you are having problems with conflict within your teams and your meetings and decision-making in those teams is less that optimal. You want to reduce conflict and increase team productivity. You'll know if things are working better in your teams if the two projects you mentioned get back on track and profitability improves. These are objectives I'm confident we can achieve. I'd be

happy to prepare a proposal if you can assure me this is something you want to go ahead with and give approval for."

Prospect: "Yes, we want to go ahead with it. What's it going to cost?"

"Let me work on this today and I'll get you a proposal by tomorrow outlining what we'd do, plus the fees involved. Can we meet tomorrow afternoon to go over this proposal?"

Once you have complete conceptual agreement on the project, you can prepare a proposal. For complete details on how to do that, read Chapter 21 on the Perfect Proposal.

Books On Closing the Deal

Let's Get Real – Mahan Khalsa

This and other books can be found online in the Action Plan Marketing Bookstore.

Notes

Chapter 20

Pricing Your Services

Adding Value to Your Services

Pricing can be the most complex part of the whole marketing process. What do you charge? How do you charge? How do you justify your rates? People go crazy about this stuff!

Whether you charge by the hour, the day, the project or a combination of ways, one thing is more important than anything else: **You must charge for the value your client is receiving.** That sounds simple, but value is a very tricky thing.

As an InfoGuru you need to remember that people are ultimately paying you for what you know and how you apply what you know to solve their problems. You are not being paid for your time (even if you do sell some of your services on an hourly basis), so you need to think seriously about how to increase the perception of value for your services.

You are more valuable if your services or skills:

- are rare or are in demand
- add solid value to their bottom line
- can solve a very costly problem
- give them something no one else can
- are guaranteed unconditionally
- are backed up by testimonials and success stories
- simply look or feel more valuable

Some of the above are determined by:

- market conditions
- marketing and presentation of your business
- your success rate and word of mouth
- your personal self-confidence
- how you establish the value during the selling process

Pricing by Time and Materials

Many InfoGurus price their services by the tried-and-true method of time and materials. It is not the preferred method, as we shall see, but I believe there are some services that cannot realistically be charged for any other way.

Stand-alone coaching or consulting

Many consultants and coaches work with their clients in one-on-one sessions either over the phone or in person. And they bill themselves very much like therapists. The client pays for the time you spend with them. Period. I've tried to work this way on a monthly basis but it just didn't work. Some clients wanted to meet with me twice a week, some barely talked to me once a month. They were both paying the same amount. It drove me crazy. I solved this by setting a fee for so many hours and simply tracking the time as they worked with me. This felt fair to me and let them stretch their time out as long as they liked.

Later we'll talk about how you can do this in combination with other things on a project or value basis.

New and unfamiliar projects

A client wants help with a project that is very open-ended and it is impossible for either of you to set clear enough parameters to give them a project price. Many people say this is the situation with most of their projects, but I doubt it. Usually the best way to handle this situation is to price the first stage of the project on an hourly basis and once the specifications and objectives are outlined, to give them a project price. I have a client who develops software on this basis. Once the initial specifications are outlined, he's able to give them a very specific project proposal.

Very short term projects

A client wants you to come in for a day or two and help you with a specific project. For something like this you might have a standard "day rate" that's based on time. However, even in situations like this you can often price this on a project or value basis. After all, some projects are more mission-critical than others and therefore worth more.

Pricing by Project or Value

Ideally, InfoGurus should price their services by the project or by the solution or by the value the project is worth to the client. Ultimately this method of pricing is the fairest both to you and to your clients. You get paid what you're worth and the client doesn't need to make a financial decision every single time you need to set up a new meeting with someone.

The key to making this work is knowing how long any given project will take. You're really not calculating this based on an hourly fee, but you sure as heck better have an idea if the project will take one month or one week of your time. If you don't, you're in a world of trouble.

The other thing you must have a good sense of is the actual value of a project. If everyone else can create a strategic plan for about 10K, you'll have quite a hard time selling one at 100K!

The key to determining value is both your experience in doing similar work in the past and what you learn during the sales process. You especially want to understand their objectives and get a sense of what it is costing your prospective client NOT to solve the problem. Remember our Implication Questions in the Professional Selling Process?

For instance, if you learn that employee attrition is costing the company $10 MM per year and you know you can easily reduce that attrition by 25%, you know you'll save them $2.5 million in the first year. Pricing your services at 5% to 10% of that savings is not unreasonable. If you have no idea of the value, you're going to have a harder time pricing your services.

Remember, as well, that most people simply like buying solutions instead of time. This is one of the reasons lawyers have such a bad name. It's not the fees. It's the endless hours that add up out-of-control with no end in sight. When people buy a solution for a fixed price they might wince at the price tag but at least they feel they have some sense of control.

You may protest that many people are out there buying commodities with no sense of value. To them, a consultant is a consultant and expertise is expertise. Unfortunately there are a lot of stupid buyers out there. They don't understand the difference between apples and oranges. Some of these people you shouldn't do business with. Others you can work with if you educate them. Others will be attracted to you because you've promoted your expertise as an InfoGuru and won't make price the main issue.

Guidelines on Project or Value Pricing

Training and facilitation

It's very easy to fall into the hourly or day rate here. After all, training is training, isn't it? Yes and no. If the first question your prospective client asks is how much you charge by the day for your training, you've gotten off on the wrong foot. You're immediately selling a commodity that can be compared to other commodities. The low price is the winner.

You need to remember that you're selling a solution and that training is one of the ways to address that solution. So what if you said this:

> "My objective is not to deliver training. Anyone can do that. And what you get is no accountability for results. I personally think that's a bad investment of your money. You want the training to make lasting changes in your organization. My training programs are designed to do that. Not only that, I guarantee it. Let's look at what you want to accomplish and then we can talk price."

Consulting and coaching

With these kind of services there is a very wide scope of what is offered and an even larger scope as to the value of what is offered. Some projects seem

totally open-ended. Others are more cut and dried. But remember the key principal – you are selling a solution, not your time. When people ask your hourly or daily rate, let them know you don't have one. Tell them you price your services on a project or solution basis and that you guarantee your work. Then work at determining value. Some projects will include many different ways of working. A little coaching, writing reports, training, feedback, surveys, whatever. You need to throw all of these into the mix and come up with a price.

Did I mention that when you value-price your services you usually make more money – often a lot more money? So you have some wiggle room in your proposals. You're not estimating down to the minute. You have a lot to work with. You understand that the stakes are high and that your fee will not and cannot be whittled down to the tiniest of profit margins.

Design and writing projects

A very good example of value pricing for design services is how I price my web site design services. I found that if I priced web sites at a fixed fee for up to 10 pages and then "a-la-carte" for extra pages and bells and whistles, I would always make good money and always meet the needs of the client. If I charged by the hour, I would penalize myself for my increased speed and effectiveness. I would really have no motivation to do a site quickly and the clients would always be looking at their watches.

Technical projects

There's no way to set a project fee on a technical project, you say. They're too open-ended. Nonsense. Yes, the first part might need to be priced at a time and materials rate until you've nailed down the specifications. But once you've done that, if you have the experience and expertise you should know what takes how long. One of the keys is to break the project into very distinct segments. That segment costs X. If the client adds a bell or whistle to the project specifications, then it costs X+. Pricing this way takes discipline and good project management skills. I assume if you're an InfoGuru in the technical area you're beyond the skills of project programmers who sit in their cubicles all day and do whatever is asked of them.

Show Me the Money

Ultimately you will get projects at a higher rate than you are used to getting if you work at improving all of the above factors that you have some control over.

Here are a number of other very important pricing tips.

- Don't give your price during your initial meeting with the client. Tell them, "I'll have to think this over. I'll have a proposal to you by tomorrow." What's 24 hours? Don't go giving ballpark estimates that they end up holding you to.
- If they press you for a "ballpark estimate" make it VERY wide. "That will be anywhere from a thousand to half a million dollars." They'll get the point.
- It is better to lose a job that you bid high on than get one that you bid too low on.

- It is a good practice to quote prices outside of your comfort zone. Higher fees will both give the perception to your client that you are worth more and build your own personal sense of value and self-worth.
- When you lose a project due to a high bid, then work at improving the other factors such as perceived value, not the price the next time around.
- Never lower your price without a corresponding reduction of services. People love to lower prices but hate to reduce value. Ask them what value they would like to remove from the project. They'll usually reconsider.
- Never volunteer to unilaterally lower your fee. That is, for no good reason, give them a lower price. If you do this, prices will tend to spiral lower and lower.
- When you get too busy, this is the time to look seriously at raising your prices. You will lose some clients but you will attract more at higher levels.
- When you improve a skill, add a technology or discover a new, more effective way to do something, raise your prices.
- Make your prices look lower by adding value that, in the long term, costs you very little. A guarantee, for instance, increases your perception of value without costing you anything. (Of course you need to be confident that you can satisfy the guarantee.)
- Make your guarantee compelling by proving to your client that they can't lose if they use your services.
- It is always better to be paid sooner instead of later. Accelerate fee payment by asking for more up front, by asking for the balance in 30 days instead of at the end of the project, and by offering a discount if they pay everything up front.
- Above all else, be clear and confident in stating your prices and asking for payment. You will seldom get what you don't ask for.

Action Plan – Pricing Your Services

1. Look at how you currently price your services and develop a value-pricing strategy.
2. If value-pricing or pricing by the solution doesn't seem possible, consider ways you can add value to your hourly services so that you are not compared to other services, like a commodity.

Books on Pricing and Proposals

Million Dollar Consulting – Alan Weiss.

This is the ultimate book on the subject and is a must-buy for every InfoGuru. I owe much of my understanding of value-pricing and proposals to Alan's books and workshops.

These and other books can be found online in the Action Plan Marketing Bookstore.

Notes

Chapter 21

The Perfect Proposal

"A proposal is not an exploration, it is a summation."

Alan Weiss

Getting the business often requires a successful pricing strategy and a proposal that outlines exactly what your client will get for their money. How your pricing and proposal is structured can be the difference between getting the business and losing it as well as the difference between making good money or poor money on a project.

A proposal starts with the understanding that you only prepare a proposal after you have gained conceptual agreement to do the work. A proposal is not so much a sales document as it is a way to clarify what you've already agreed upon.

Failure to understand this simple idea is the foundation of most problems with pricing and proposals. What we tend to do is jump in too early with both feet, proposing things that are not based on a response to the desired objective of the client. We prescribe without diagnosis. In the medical profession that is called malpractice but many professional service businesses do it as a matter of course.

I've seen so many people get led around by the nose by prospects who were not serious buyers or simply time-wasters and tire-kickers. The worst harm they can do to you is waste your precious time. And a huge amount of time and energy can go into creating a proposal that shouldn't have been prepared in the first place.

What do you need to know before you prepare a proposal and reveal a price? Several things, all very important. They include:

- The stated objectives of the client
- The value to the prospect of solving the problem
- The relative importance of the project to other projects
- The cost of not acting to solve the problem
- Their experience of working with a service like yours
- Their expectations going in of what can or cannot be accomplished

This list could probably go on forever, but I hope the point is clear – **the more you know about a prospect's situation, the better prepared you will be to put together your pricing and proposal.**

So your first job is to find out everything you can. For instance, in interviewing your prospects I recommend asking basic questions about the company such as what their gross sales are, their profit for last year, how many people work for the company, who their competition is and how much they spend annually on consultants. To me those questions barely scratch the surface of what I would want to know about a prospective client. Most of the InfoGuru clients I coach simply neglect to get all that important information. How can you prepare a proposal for a prospect if you don't know, at minimum, the foundational business information about their company?

The answer is, you can't. You need to position yourself as someone who is interested and concerned with your potential client. If you don't know the basics, how can you expect to solve their most pressing problems?

What You Need to Learn Before You Write the Proposal

Situation/Problem

The most important thing you need to learn about a company or a potential client is "where does it hurt?" Where is the pain? What is the nature of the pain? How long has the pain been going on? How big is this pain relative to other pains? And what are the possibilities for the company if the pain is dealt with successfully?

Remember, in the section on Core Marketing Message, we talked all about using pain or problems to get the attention of your prospective clients? If you are an expert at relieving a certain kind of pain, people are usually going to give you some time to take a look at theirs. However, you then need to take that time to dig in and understand the details of their pain.

> "You've said you're losing a lot of people from attrition. How many people are you losing, what percentage of the workforce each month and how difficult and expensive is it to replace those people?"

Now when you meet with your prospect you will not, must not start talking about your solution – that is what the proposal is for. No, you want to take more time to explore their problem. For instance, not all attrition in all companies is caused by hiring poor people. It might be that management is terrible. It might be that the opportunities are limited. It's your job to find out exactly what's going on first before you come up with your solution.

Objectives or desired outcomes

Next, you want to learn about their objectives. You know people are leaving because they are hiring the wrong kind of people. Perfect. Now you want to know what they really want to accomplish. And you don't want to be general. You want to be specific.

- What is an acceptable level of attrition?
- What exactly is attrition costing you now?
- What would it mean to your competitive position to reduce attrition?
- What percentage of your attrition costs would you be willing to dedicate to reducing attrition?

Value to the client

Next you want to understand what value this project has to them. Nobody seems to ask this. We often ask about budgets but that doesn't really help much. You want to learn what the actual value is of doing this project. I don't mean a dollar figure, necessarily, but sometimes you can get even that.

- What would reducing your attrition by 25% per year mean to you? (in dollars)
- If you got your projects out on time instead of 10 days late, on average, what kind of savings would you realize?
- If you cut the steps in this process in half what would that mean to your bottom line?

If the answers to these questions can give you a general feel of the value, you have something to go on. If they will be saving 1 million dollars a year by reducing attrition by 25% it wouldn't make much sense to give them a $5,000 proposal. That's way too low given what's at stake.

How they'll know you're successful

Finally you want to know what success looks like to them. How would they know the project was successful if they tripped over it? That is, what specific things would need to be different to know that things had improved, that you had met your objectives?

- What changes in behavior would you see?
- What difference would you see in costs?
- What results would occur that didn't occur before?

When you have information like this, you have much better foundation for developing a proposal. This is the actual information that goes into the proposal. This information is much more important than "what we are going to do." Yet in most proposals, that is what they usually consist of. They are all about the process or methodology.

Sure there needs to be some information about what and how you will do what you do but it usually needs to be a lot less detailed than you think. Give yourself some breathing room. They are buying results, not processes.

Before you present your proposal, there are a few other things you should consider.

- Once you give them a proposal, can you expect an answer within a week? If not, do you really want to be playing the game of hurry up and wait?
- If you promise to deliver a proposal by a certain date, why not make an appointment to deliver that proposal and answer any questions as they come up?

Proposal Format

What is a successful proposal format? That is, what is a format that will increase your likelihood of getting the project?

I recommend the following nine main sections:

- Situation Summary
- Objectives
- Value
- Measure of Success
- Methodology
- Timing and Scope of Work
- Joint Accountabilities
- Risk Reversal
- Compensation

Situation summary

Here is where you sum up what you know about their current situation. If you haven't asked a lot of questions, you aren't going to look too sharp, but if you've been tuned in, this section will let them know.

Objectives

This is undoubtedly the most important section of the proposal. In your meeting or meetings, your prime objective was to dig these out. Now you want to regurgitate them in a form that will make your prospective client nod in agreement. This is what they are buying. This is what they get. This is the problem you solve. This is what will make them happy.

Value

Outline what the problem is costing them. You don't have to tie this directly to your compensation, but you can point out that you can reasonably expect to decrease costs by X% saving them Y dollars over so-and-so a time. This can have a lot of attention-value in a proposal. If you estimate, be conservative.

Measure of success

This is, in some ways, a repetition of the objectives, from the point of view of a successfully completed project. When you are done, how will things be different? How will behaviors change? How will the numbers change?

Methodology

This is what you will do to accomplish the objectives. You want to give an outline of the things you will do but you don't want to give away the store. If you are giving training sessions, don't include the manual. If you are doing statistical analysis, don't give a long-winded technical explanation. Keep it simple and

keep it credible.

Timing and scope of work

When will you start and complete and what exactly will the project entail? You want to be explicit about this or you're liable to get into "scope creep" when things keep getting added without additional compensation. You need to include some of this in your estimate but you don't want a client "adding an extra department or two" to your training program without additional compensation.

Joint accountabilities

Who will do what? What will you be accountable for and who in your client company will be accountable for what? Make sure you know who is reporting to whom and know where the buck stops.

Risk reversal

You're offering some kind of guarantee aren't you? To what degree do they need to be satisfied? What if they're not satisfied? What happens then? The whole purpose of this is to set up a win-win project. If you don't promise anything, how can you really know what you're expected to do? How do you know what their expectations are?

Terms and compensation

This is where you tell them how much your services are going to cost. Whether you price by the hour, day or project, make it very clear what you will be billing for. And don't forget to ask for something up front. Always. And ask for the balance in 30 days. There's no rule that says 50% down at the beginning and 50% upon completion. If you bill a daily rate, don't bill monthly, bill twice a month.

And don't forget expenses. If you forget, they won't remember.

Secrets to Successful Proposals

- Sometimes it is better not to do a proposal until you have done a needs-assessment of some type. Perhaps you do this on an hourly basis and then follow-up with the more detailed proposal once you better understand the situation and scope of work.
- For any large project, you protect yourself by doing a proposal. You clarify expectations and avoid misunderstandings. Sometimes a proposal can be in a more informal format such as a letter of agreement. Nevertheless, it should follow the outline and topics above.
- Never do a proposal on speculation. It wastes your time and usually doesn't increase the chances of getting a project. This includes not answering to RFPs. Unless you specialize in this sort of thing, it's very risky.
- Make sure you don't give away the details of the methodology of what you

will do. Why do they need you if you tell them in great detail what to do? Keep this part of the proposal fairly broad. Tell them you will be doing one-and-one coaching sessions plus group training. Don't give them the complete syllabus of the training program. This will be one of your first deliverables.

- Provide the client with a choice of yeses – give them two or three project options and prices for those options to increase the chance of you getting the project. Try offering "basic," "standard," and "deluxe" options.
- The proposal should be no more than 2 or 3 pages long. It's a proposal, not a book.
- Keep the language simple and straightforward. Nothing complex or confusing.
- Keep the legalese out of the proposal. If you add legalese, guess where the proposal goes? – to the legal department! Not a good idea!
- Try to present the proposal in-person if possible. By sitting down with the prospective client and going over the details, you can make the final case for your services and answer any questions that may come up.

Action Plan – The Perfect Proposal

After your next meeting with a prospective client, use the proposal format as outlined above. By creating a template of the proposal on your computer all you need to do is fill in the details next time, saving you hours of work. Look at the sample proposal in the Appendix.

Books on Pricing and Proposals

Million Dollar Consulting – by Alan Weiss.

This and other books can be found online in the Action Plan Marketing Bookstore.

Chapter 22

Performance *– The Ultimate Key to Marketing*

What on earth does Performance have to do with marketing?

A whole lot, it turns out. Performance is about taking care of clients at such a high level that they keep coming back, as well as referring friends and associates. Without the 5th P you may attract and sell a lot of clients, but you won't keep them for very long!

A lot of successful InfoGurus base their businesses on the 5th P alone. Many of them don't know a lot about "marketing" but most of them know volumes about working hard, taking care of customers and doing a great job.

Performance isn't something you do, it's something you are. It's a mindset, a complex set of beliefs, attitudes and behaviors that go beyond any particular set of rules about customer service or even standards of professionalism.

You can spot great performance in a moment. And you notice it by the way you feel – whether it's a waiter in a restaurant, a clerk at a airline counter or a consultant leading a training program. Performance is about energy and commitment and caring and excellence.

But can you pin down great performance to a set of qualities that can be identified and improved upon? In fact you can. Recent research on the most successful people in America (millionaires and multimillionaires) has revealed some very consistent qualities that show up over and over.

The Millionaire Mind

In Thomas Stanley's Book, The Millionaire Mind, after surveying hundreds of millionaires about the qualities that they felt were most important to their success, I was delighted to note that eight of the top nine qualities were all about the 5th P of Performance (number four was having a supportive spouse).

Things like going to the right college, having a high IQ, being lucky or even finding a profitable niche were much lower on the list. No doubt about it, all the top ones were about high performance.

These eight, in order of importance were:

1. Being honest with all people
2. Being well-disciplined
3. Getting along with people
4. Working harder than most people
5. Loving your career/business
6. Having strong leadership qualities
7. Having a very competitive spirit/personality
8. Being very well organized

Let's take a closer look at these eight qualities. How can you work at improving them, thereby improving your overall performance?

1. Being honest with all people

In business, this means not exaggerating what you can really do. When you make a promise (remember, positioning is a promise) you'd better be sure your performance equals that promise. To do less is to be less than honest. And there's no better way to lose the trust of clients than on this one.

2. Being well-disciplined

Clients like consistency. They like calls returned, reports that are accurate and work that is complete to the last detail. The opposite of disciplined is sloppy. Sloppy work kills referrals while lowering your own self-esteem. Joseph Sugarman, the mail-order millionaire put this high on his list of success secrets: Clear off your desk at the end of every day!

3. Getting along with people

People do business with people they like. And people like people who like them. You can't fake getting along with people, you really have to sincerely appreciate them – no matter how different they are from you. Doing business with people you don't like or respect will result in negative feelings and negative word-of-mouth.

4. Working harder than most people

The extra mile does count. It's that call at the 11th hour, that recommendation of a relevant book and the knowledge of your industry that makes you the InfoGuru you are. Working hard doesn't mean being a workaholic. It means focusing on the things that matter, the things that give you a generous return on your investment of time and energy.

5. Loving your career/business

What fishermen catch the most fish? Is it the ones who have the most lures, the best equipment and the most expensive boats? Sometimes, but more often it's simply the fishermen who really love fishing. Nothing can substitute for a passion about your field. It will give you a "magnetic edge" when it comes to attracting and retaining clients.

6. Having strong leadership qualities

The owner of a professional service business should never think of him or herself as just a freelancer. That's like someone who hops from job to job but never gives up the employee mindset. You need to consider yourself as a creative entrepreneur, even if you're only a one-man show. Clients follow leaders and bring their friends along with them.

7. Having a very competitive spirit/personality

Let's admit it, winning is fun. A professional service business owner is not only committed to succeeding at his or her own practice, but is committed to sharing that winning spirit with clients. If you see your business as a game whose aim is to make a lasting difference, your clients will want to join your team.

8. Being very well organized

Flakiness scares off clients by the droves. Being organized, on time and reliable makes clients feel comfortable and taken care of. How many times have you heard people say something like, "He/she did a very good job but it was a real struggle to work them." Is that someone you'd call to help you or would you ask for another name?

Action Plan

Score yourself from 0 to 5 on the eight qualities above. This might give you some insight into where you need to improve your performance. Who knows, you might realize you're in the wrong business or perhaps it's just a matter of getting better organized.

Managing Expectations

You won't have good service if you don't successfully manage expectations. The baseline of client satisfaction is meeting expectations, but you can't meet expectations if you don't create them explicitly in the first place.

For instance, if you promise to get the project done on time, your conception of "on time" might be within a week or so of when you said it would be done. The client's conception and expectation is to be done on the exact day you first mentioned. When you are late by a day on the client's timetable, you have failed to meet their expectations. And that's poor performance in the eyes of your clients.

What do you need to do to manage expectations?

Be crystal clear about your purpose.

If you're just interested in making money, service will be left behind. But if you have your eye on service, money will often take care of itself.

Make Clear Agreements

And in many cases, put them in writing. Tell them what will be done and when it will be done. Don't rush through this part. You need to create a win-win deal. And if expectations aren't clear, you're going to have problems later on.

Create Consequences

You're more likely to stick to your agreements if there is some consequence of not doing so. This is another way of talking about guarantees. It ups the ante and increases the chances you'll perform at a higher level.

Don't Make Excuses

Sure things go wrong, but so what? It's still your responsibility. Communicate that you did not fulfill your commitment and then make a new commitment. What will kill you is trying to cover your tracks with excuses and even lies. People will forgive you for being imperfect. Just cop to it and move on.

Get Promises From Clients

It's not a one-way street. They need to make agreements with you and keep their side of the deal or you're going to have problems. You expect them to hold you accountable; you need to hold them accountable as well. If you promise a project by a certain date and they don't fulfill their commitments, slowing things down, you must confront this behavior or it will continue.

Express Concerns Immediately

If an early meeting does not go well, for instance (they are late, unprepared, waste time, etc.) write or talk about it in very specific terms. Tell them what you need from them to make the project successful and reiterate your commitment. Let them know you are not willing to continue on this basis. If they drop the project, they've saved you a world of problems. If they want to continue, you'll likely get a much more cooperative, collaborative client.

Action Plan

Take just one of the areas above and make a commitment to improve it in your business. Be specific. Write it down as a business policy: "I will put all agreements in writing to ensure that I have communicated clearly with my clients what is expected of me and what I expect of them on each project." It's that simple. When you nail that one down, then add another.

Creating Raving Fans

Ken Blanchard noted that it is not enough to satisfy clients. You have to turn them into "Raving Fans," clients that are so satisfied, so happy, so ecstatic about how you've helped them that they can't help but enthusiastically tell their friends.

But what creates Raving Fans?

Do What the Competition Isn't Doing

You can create a sustainable competitive advantage if you offer what the competition isn't. One way to learn this is to ask your clients what bugs them about other professionals in your field. Listen closely. They may be sharing the key to what it takes to turn them into raving fans. You might even turn this particular thing into your Unique Competitive Advantage.

Be Creative

There's a wonderful book out called "A Whack on the Side of the Head," by Roger von Oech. It helps you come up with creative ideas – even if you think you're not a creative person. It shows you many different techniques for stimulating creativity and generating all kinds of ideas. Start with the question: "How can I create raving fans?" and then apply one or more of the ideas from this book. I think you'll surprise yourself!

Work on the Little Things

Safeway (a popular California supermarket) gets it. They call you by name after you've paid by looking at the sales slip, and they put everything down and help you find what you're looking for when asked. Two very little, simple things. But they make all the difference. In a commodity world it's those things that matter. Alan Weiss returns his phone calls in 90 minutes. It's a little thing but it amazes people.

Give a Little Extra

People hire you for your expertise but they keep coming back for the little extras that you offer. And they tell others about you when you go above and beyond the call of duty. But don't misunderstand. This doesn't mean simply working harder. It means being available and offering value where others wouldn't. Why not offer an exclusive email service just for your clients with tips and ideas that only they receive. Or invite them to a free client-only briefing once a year to share ideas and brainstorm. Let your creativity kick in.

Commit to Continuous Improvement

Once you've established a certain level of service and you see it's paying off, then look to see the next level of service you can offer to delight your clients. One client told me that she sent thank-you notes to every client after working with them for the first time. Another, a therapist, hands out one- or two-page articles to her clients and gives an extra copy to share with a friend. Who knows, the next idea you come up with might be the one that "pushes your business over the top!"

Action Plan

Take just one of the areas above and make a commitment to improve it in your business. These are somewhat different than the expectations category. This is not so much a matter of policy or communications but of creativity and commitment. Nevertheless, pick one, make it specific and write it down.

For example: "Near the end of every project I'll look to see what little extra I could add. It doesn't need to be big, but I will make the effort to do something I don't usually do." Again, don't make a commitment to turn your clients into Raving Fans overnight. Give it several months. Take it one step at a time.

The Erin Brockovich Effect

If you haven't seen the movie Erin Brockovich yet, certainly you've heard about it: The true story of a single down-and-out mom who dresses provocatively and swears like a sailor, becomes a legal assistant and virtually single-handedly wins

the biggest toxic damages case in U.S. history. We cheer for Erin, hiss at the attorneys and sympathize with the victims. But if we take the movie just on that level, we really miss a much more profound message – especially if we are professionals who deal with clients.

Performance is possibly the most powerful of the 5 Ps, but we usually don't pay much attention to it or we take it for granted. *Of course* we provide great service to our clients and go the extra mile to do a great job! Oh, do we really? Erin Brockovich proves that most of us do a pretty miserable job. Erin, in my opinion, is the master of the fifth P.

Erin Brockovich does much more than go the extra mile. I'd like to highlight her actions throughout the film and I think you'll see exactly what I mean.

Erin is curious.

Even though the case she's been handed is a pro-bono one, Erin is interested enough to pursue a puzzling question: Why are the client's medical records included in a supposed real estate case? No one else in the office seems to care.

> How curious are you about seemingly unrelated facts regarding your client's situation? If you were more curious, what could you learn? This doesn't mean stepping over certain boundaries, but I've found most people don't even approach these boundaries.

Erin asks the right questions.

From the very first interview with her client, Erin digs deep to try to really understand what's going on. And she doesn't stop. She keeps asking the questions that break the case wide open.

> Do you ask the right questions or enough questions or questions that go deep enough? Are you more interested in a quick-fix than you are in discovering what's really going on? You need permission to ask questions, but don't worry about asking too many question. Most ask too few.

Erin is warm and friendly.

Dealing with small-minded, dishonest or unfair people brings out the worst in Erin but when she's meeting with clients she treats them like close friends. People trust her because she likes and cares about them.

> Do you make a real personal connection with your clients or are you aloof, unfeeling and "professional" like the woman attorney in the movie?

Erin is passionate.

Perhaps this is communicated more obviously than anything else in the film. Of course we expect our heroes to be passionate, to care, to go out on a limb, to get shot down and get back up again. We forget that this is a rare quality.

> How passionate are you about your clients, about your projects, about your results? When was the last time you took an unpopular stand in the face of overwhelming opposition and then kept at it until you got results?

Erin works hard. Very hard.

Endless back and forth trips to her clients' town take their toll on her kids and her relationship. But Erin's on a mission and knows that what she's doing is making a difference.

> How hard do you really work for your clients? Do you keep slugging away until you discover a workable solution or do you settle for good enough?

Erin works smart. Very smart.

I think the most moving scene in the movie is when Erin is challenged about the facts of the case. Not only does she know the facts, she has memorized every single phone number of the 660 plaintiffs!

> How familiar are you with the intimate details of every client's situation? Do you care enough to dig into the minutia, realizing that without knowing these details you are next to useless?

Erin takes advantage of her best assets.

Perhaps the most discussed aspect of the film is how Erin dresses. We're talking cleavage, bare midriffs and very tight, short skirts. Roger Ebert, in his review, thinks this actually ruined the film. Well, perhaps it was overdone, but Erin knows that one of the biggest things she has going for her are her looks and she uses them to her advantage when she must.

> Do you take advantage of your best assets? We all have natural gifts (humor, intelligence, an eye for detail, etc.). Are you using them to their fullest to help your clients win? (For most, I don't suggest cleavage, bare midriffs and very tight, short skirts!)

Erin gives her clients the bad news.

No one wants to hear that the best course of action is to bring the case to binding arbitration instead of to trial. But she and her boss tell it straight and are so upfront that 100% of the clients agree to do what they recommend.

> Do you give it straight to your clients when it's not what they want to hear? Do you build a solid case for your course of action and do it because it's in the best interest of your clients?

Erin is approachable.

The case finally gets the big break it needs when a rather unsavory character approaches Erin with some vital information. He says, "I feel I could tell you anything." It's not just a pickup line. People do feel they can tell Erin anything.

> Can your clients tell you anything? Are you approachable, nonjudgmental, open, caring and sincere? If you're not, you'll never build the level of trust vital to building true cooperation with your clients.

Erin shares the victory.

In the final scene after she tells her original client the outcome of the case, she shares the win with her boyfriend who took care of her kids all the time she was away or working late. She acknowledges she couldn't have done it without him.

> Do you acknowledge those who support you? Do you show gratitude for others involved in the project and let them share in the win?

Besides being a very entertaining and inspiring movie, Erin Brockovich has a lot to teach us about the 5th P of Performance. If most of us performed at half her level, we'd experience success beyond our wildest dreams. (And we wouldn't need to worry so much about the other 4 Ps of marketing either!)

If you haven't seen Erin Brockovich yet, GO! If you've already seen it, GO AGAIN!

Action Plan – Performance

Paradoxically, although Performance may be the easiest of the 5 Ps to talk about, it is undoubtedly the hardest one to achieve consistently. Most of us give lip-service to performance, customer service and excellence. We think we're already there. We fool ourselves however by thinking that the other 4 Ps are more essential. They're not.

One problem we have in this area is that we don't feel ashamed not to have mastered the first 4 Ps – after all, that's not our area of expertise. But no one wants to admit that their performance is not up to par. That's embarrassing.

Why do most of us have a blind spot in this area? I believe it's because we judge ourselves on our intentions. We mean to do well, work hard, keep our word and take care of our customers. So when we don't do it, we think it's the exception, not the rule.

Unfortunately, our clients judge us not by our intentions, but by our actions. And make no mistake, people are harsh judges. When someone receives poor service, they tell dozens of people. When they receive good service, we're lucky if they tell just one or two people!

I wish I could wrap this up with a simple "here's what you need to do to perform at the highest level possible." But I already did that. I've given you plenty of guidelines, principles and examples. How can you pull off your own version of the Erin Brockovich Effect? How can you perform at such a high level that you literally attract more clients than you can accept?

I promise you something. If you commit yourself to finding the answer to that question with a burning passion that never subsides, you won't discover one simple answer. You'll discover hundreds of answers, one action at a time, one client at a time.

Creative opportunities to do better, to serve better, to make a difference and a contribution will present themselves every single day. Performance won't be a technique or a strategy, it will become a way of life. You won't have any choice but to act in a way that serves your clients' very best interests. And without thinking about it much, your own interests will be taken care of automatically.

Have fun along the way. It's a great ride.

Books on Performance

The Millionaire Mind – Thomas Stanley, Ph.D.

Raving Fans – Ken Blanchard and Sheldon Bowles.

A Whack on the Side of the Head – Roger von Oech

How to be a Star at Work – Robert Kelley

How to Win Friends and Influence People – Dale Carnegie

These and other books can be found online in the Action Plan Marketing Bookstore.

Notes

Chapter 23

Performance *– Putting Your Marketing into Action*

How can you become a successful marketer?

I want to devote this final chapter to your own personal marketing performance. Throughout the manual I've given you principles, strategies, techniques, tools and action plans. But despite all of this information, you still might have a hard time getting started and getting around to doing the marketing you know you need to do.

Many of the questions that clients ask have to do with how to actually manage to get their marketing done. Hopefully this chapter will provide some answers. I'll put it in a question-and-answer format.

How do I get past my psychological blocks to marketing?

A psychological block is usually a thought or belief that prevents you from getting what you want. For instance, if you have the belief that you're "not a marketing type," then every time you try a marketing strategy, you filter it through that belief and find that you don't get very far, because, after all, you're "not the marketing type."

It's important to realize that most of these thoughts, beliefs, convictions or mindsets are patently false. There's no such thing as a marketing type, for one! What I recommend is to take a little time to write a list of your favorite marketing mindsets or beliefs. The first step is to simply acknowledge what's there. Here's a few that you may be familiar with.

I don't like marketing

Marketing is dishonest

Marketing is manipulation

I'm not the marketing type

I don't have time to market

I'm not a good writer

I'm not a good speaker

I'm not a good networker

I'm not a good salesperson

I'm not good with computers

I have to do it perfectly

This is going to take a long time

I can never seem to do it right

Nobody would be interested anyway

I don't want to bother people

Now add your particular beliefs about marketing or self-promotion to this list and then ask yourself this series of questions for each of them.

Is this thought/belief really true?

How do I react when I think that thought?

What am I getting out of having this belief? (hidden payoff)

What is it costing me to believe this?

Is this belief something I'm willing to let go of?

Who would I be without this belief?

Try this with just one belief to start – not necessarily the strongest one – and see what happens. Then take one simple action that this belief was preventing you from doing before you looked at this.

For instance, if you wanted to write something about your business and you kept getting stopped and you noticed that you had the thought, *"I'm not a good writer and I have to do it perfectly or not at all"* (a common one, I've noticed), then go through the following series of questions.

Your questions and answers might go something like this:

Is this thought/belief really true?
It's probably not true; it's something I believe about myself. I've had this belief for a very long time and it makes it hard to write anything without a lot of struggle.

How do I react when I think that thought?
I delay, procrastinate, worry, think of how people will judge my writing.

What am I getting out of believing this? (hidden payoff)
I get to not make mistakes if I don't write. Once I wrote an essay in fifth grade that I thought was really great and I got a D on it because there were so many grammatical errors. By not writing, I avoid being judged.

What is it costing me to believe this?
It's costing me my self expression as well as success in my business. Every time I need to write something, it takes forever and it's usually dull and flat.

Is this belief something I'm willing to let go of?
Yes, I am willing to let go of it. I really have a lot to say. And I can always show it to someone else to help correct my grammar.

Who would you be without this belief?

I'd be a lot more relaxed about writing. I wouldn't worry so much about mistakes and being judged.

Now turn this thought around.

I'm a good writer and I don't have to write everything perfectly.

Is that as true or truer than the original statement?

Yes, it is!

This exercise, adapted from The Work of Byron Katie, done with real sincerity and commitment, can make a huge difference to breaking through the barriers to marketing yourself. Give it a shot! There's a worksheet at the end of this chapter that you can use to apply this exercise to any stressful thought about marketing.

How do I find the time to do my marketing?

Marketing is something you first have to commit to and then schedule. For instance, if you make a decision to do an eZine on a monthly basis, do an action plan to determine what you need to do and how much time it will take. Say you determine that the total time with planning, writing and sending it out will take half a day. Next look at your calendar and see what day of the month you'd like to put your eZine out and block that half day on your calendar. And then honor that "marketing appointment with yourself."

People invariably say that something interrupts them and then it gets pushed back. Sometimes things like this happen and it's unavoidable but you need to have discipline. For instance, when a client calls and must see you on the day you've scheduled, look at your calendar and ask yourself if you can push it back a day or two. That's not a problem. But if you won't be able to get to it in three more weeks, then tell the client you can't meet them. No kidding. Your overall marketing is more important than one client meeting. You aren't their employee.

Create a marketing calendar for the main things you decide to do and stick with it as religiously as possible. If you schedule it and make it important, it stands a higher chance of getting done. If you decide to do it when some time opens up, you'll never find the time.

Mastering marketing is like anything else. It takes some time and study. I'm willing to bet you have time in the evening. Take that time to read this manual and other marketing books instead of watching TV. If you did that just two nights a week you'd be way ahead of most other InfoGurus.

Stop making excuses. Universally humans have many very bad habits. Two are making excuses and complaining. Very few take the time to reflect how these two "little things" are eating away at their lives, their success, their fulfillment. You need to put your attention on what you want. It's really that simple – and that hard.

How do you avoid the "roller coaster syndrome?"

How do I prevent the situation where I either have a lot of clients and have

no time to market or I have no clients and need to market all the time?

Some of this is answered in the question above, but to be more specific, you need to be doing some marketing all the time, no matter how busy you are. The marketing an InfoGuru does is for the long-term, not the short term. I don't consider getting on the phone and calling up all your old clients to drum up some work a very effective marketing activity. Yes, it can work. But if you lay the groundwork of building visibility and credibility, people will call you on an ongoing basis and you won't have the "roller coaster syndrome." For many, this might be doing as little as a few talks per year, and sending out an email newsletter. The key is to do it consistently and to work on doing it better each time.

What do you do when you're just not a good marketer?

Many people have this view of themselves. But remember that marketing has nothing to do with a personality type. You can market no matter who you are. The key is that you have valuable information and knowledge and you're willing to share it. You then use the approaches in this manual and see what happens. Sure, you have to have some degree of motivation, even passion for your work. What I hear as a subtext in all of these questions is "How can I behave like an employee but get all the benefits of being self-employed?" That's a bit like saying "how can I avoid all work and still be successful?" Get real!

I'm still not getting very good results. What do I do?

First, you need to have some perspective. I worked with a client who put a lot of work into his eZine, but after about 6 months only had about 80 subscribers. I reminded him that one response to an eZine had turned into a client with a $32,000 project! The great thing about many InfoGuru businesses is that you don't need a lot of response to be very successful. You just need **some** response.

Perspective is also important when looking at what you've actually done. Sometimes it might feel like you've been doing nothing but marketing activities. But when you really look, you've been thinking a lot about marketing (which is very important especially in the initial stages) but you really haven't put much into action. Marketing is like planting trees. It takes watering, tilling and pruning but if you keep at it, it will bear fruit.

Perhaps the hardest part of all of this is that the devil is in the details. So pay attention to those details. For instance there are several steps necessary to get good results from speaking engagements:

> First you have to target the right groups, contact a decision maker, send your package and follow up. All this before you even get booked for the talk. Then you need to prepare your talk and your handouts, practice, show up and give the talk and then find a way to get the cards of those who attended!

A lot of things can go south before a client comes out of this activity. A step people often forget is getting those cards and having a plan for follow-up. Maybe your talk isn't really very good. Or perhaps it's the wrong audience in the first place.

So you need to work on this strategy until you've nailed it down. Then you can repeat it over and over and expect to get consistent results.

I can't take rejection. How do you handle it?

Nobody likes rejection but again it depends to a great degree on how you think about what actually happened. The stereotypical rejection scenario is calling a potential client and having them say they aren't interested. If you take that personally, then it's rejection. If you simply realize that perhaps they didn't need the service right now, then it has nothing to do with you. I send out about 15,000 emails to my list every month (as of April 2003). A number of them unsubscribe every time I do. I could obsess about that and feel rejected. I don't have time for that. I'm focused on the positive responses I got from that email.

There are two ways you can avoid the chance of rejection. The first is to never do anything that could possibly get you rejected. Stay home and wait for the phone to ring. The other is to create strategies that are virtually rejection-proof.

Think out or script your approach to any marketing situation. For instance, if you want to get your article accepted for publication, there's a good chance of getting rejected if you just send the article in to an editor with a brief cover letter. So do your homework. Read the publication. Find out about the kind of thing they're looking for. Write a query letter based on the info in this manual. That's virtually rejection proof. They might say they aren't interested in your topic right now, but they haven't rejected you or your article. On to the next! And because you're so prepared, you increase the chances of success next time.

I'm not a good writer. How do I improve?

Since marketing as an InfoGuru is so dependent on writing, what can I do?

A few things. The first is to practice. Write a lot and you'll get better. The next is to read. Read in your topic. Read novels. Read anything. You'll pick up stuff by osmosis. Read books on how to write well. I just read the one by Stephen King, "On Writing," and found it very useful as well as a fun read.

The other thing to do is get an editor. Write your material or articles doing the best you can, and then send them off to a freelance editor to clean up your prose. You'd be amazed to know how many nonfiction writers use editors extensively to rewrite their material. Some are terrible writers. That's OK. The thing is, do you have good ideas? An editor can help you turn those ideas into something you'd be proud to send out.

Finally, you can hire a writer. This, by far is the most expensive proposition. It means they'll interview you, transcribe the interview, write and edit. It takes a lot of time so it doesn't come cheap. But it might be the right solution for you.

I'm not a good speaker. How do I improve?

I have a real phobia about this. I couldn't lead a group in silent prayer!

You're not alone. And me telling you to practice won't help much if you're really scared. If you're just an OK speaker you will get better with time and practice, but

what if you don't have the courage to get in front of an audience?

If you're just in the "not great" category, join Toastmasters and go weekly. It's a great organization that will really help you with your speaking skills. It's also cheap. There are also many good books out there on speaking and giving presentations as well.

Back to those of you who are scared of speaking. Most often this came about because of some humiliating event when you were a child. You went up to present something to your 3rd grade class and you did something that made the whole class laugh – and the teacher punished you to boot! So every time you stand up to speak, you're reminded of that situation and you feel humiliated again.

Did you know that there are professionals who specialize in helping you with this? If your problem is not too drastic, try a speech coach. If it's really a phobia, try a hypnotherapist or NLP practitioner who has a track record with this sort of thing. Believe it or not, in just a few sessions you can eliminate this fear forever. And since speaking for InfoGurus is so important, I recommend you do this for yourself. Why live a life in fear when it's something you can get beyond?

What's the biggest mistake I can make in marketing my business?

Besides not using the InfoGuru Marketing Principle? That's first really. You're too focused on getting and not on giving. The principle permeates this manual. It's the most important thing, and if you don't use it, attracting new clients is **always** going to be a struggle.

The other things have nothing to do with marketing but with attitude and effort. Ask yourself where you rank with the following qualities. Score yourself from 0 to 5.

Vision and Values

Passion and Commitment

Creativity and Innovation

Hard Work and Planning

Persistence and Resilience

If you score yourself low, you may have a long way to go. You'll make mistakes over and over because you won't care enough to master what works. If you score yourself high, you'll realize that the information in this manual is simply one of several valuable resources that can help leverage your success. You'll keep looking and learning, testing and trying until you become great, not only at marketing your services but at serving your clients.

Books on Personal Performance

The Millionaire Mind – Thomas Stanley, Ph.D.

Loving What Is – Byron Katie

Play to Win – Larry Wilson

These and other books can be found online in the Action Plan Marketing Bookstore.

Doing "The Work" Worksheet

This is an extraordinarily powerful process, if you actually DO IT!

Statement/Belief: _____

1. Is it true? _____ (yes or no)

2. Can you absolutely know that it's true? _____ (yes or no)

3. How do you react when you think that thought (or believe that belief)?

Any of the following...

Body sensations/stress	I react by _____
Where in your body?	_____
Facial expressions	_____
Feelings/emotions	_____
Specific fears	_____
What you say or do	_____
Past actions/behaviors	_____
How you treat others	_____
How you treat yourself	_____
Shoulds/shouldn'ts	_____
Other thoughts/beliefs	_____
Images from the past	_____
Payoff (what benefit you get from holding onto this thought/ belief)	_____

www.thework.org
Adapted by Robert Middleton
www.actionplan.com

Make copies of this sheet and use it to work on all the resistance, fears, and stressful beliefs you have about marketing.

4. What is it costing you to believe that thought or belief?

Cost to your body/health — It is costing me _____

_____

Cost to your relationships _____

_____

Cost to your finances _____

_____

Cost to your job/business _____

_____

Cost to your integrity _____

_____

Cost to your creativity _____

_____

Cost to your aliveness _____

_____

Cost to your self-esteem _____

Possible follow-ups:

Does this thought bring peace or stress into your life? _____

Can you see a stress-free reason to keep that thought? _____

Can you see a reason to drop this thought or belief? _____

5. Who would you be without that thought or belief?

Re: your body/health — Without this thought I would be _____

_____

Re: your relationships _____

_____

Re: your finances _____

_____

Re: your job/business _____

_____

Re: your integrity _____

_____

Re: your creativity _____

_____

Re: your aliveness _____

_____

Re: your self-esteem _____

Now turn the thought or belief around _____

_____

Is this as true or truer than the original thought or belief? _____

Conclusion

Congratulations, you completed the manual!

What's Next?

There is a lot in this manual and I'm willing to bet you've only scratched the surface. Many people have used this manual to completely transform their businesses - to attract as many clients as they could possibly handle. You can do it as well.

Here's a few things I recommend you do to take advantage of this manual.

1. **Go over each chapter** and do the exercises and action plans in each chapter. Slow down. Really create a step-by-step plan with to-do lists and things you have to research and study before you put them into action. Think carefully before you start but don't get bogged down with "paralysis by analysis."
2. **Get feedback.** Talk to associates, network, talk to clients and join the InfoGuru Support Forum on the InfoGuru Manual site. If you have a question, you're likely to get a dozen very informed answers from some very involved InfoGurus who want to help.
3. **Read more material.** I've listed several books in the manual that are all available at the Actionplan.com web site. Check out the resources and read some of the articles on the sites listed. Take a seminar or two. Take one or more of my TeleClasses or get the tape or Real Audio of a previous TeleClass.
4. **Don't give up on yourself.** You're just as smart, just as able, just as creative as the next person. The key is persistence. If you never give up, you can't fail. Sooner or later you'll find the best marketing strategies for you that will start to attract the attention and generate the response you've always been hoping for. It happened to me and about the **only** thing I had going for me was persistence!

The next sections are the Online Bonuses and the Appendix. I wish you the best of success in marketing yourself as an InfoGuru!

Robert Middleton

Online Bonuses

Get these additional online bonuses to the manual

Bonus Material

All the bonus material below is online. You can click the hyperlinks below and be taken to that section. You need to be online with an Internet connection to get to these bonuses. There is as much material here as in the whole manual itself.

Resources

Links to online articles, Internet tools and other marketing resources.

Articles

A large collection of articles from my weekly More Clients eZine covering a wide variety of topics on professional service business marketing.

Goodies

Look here for pdf files and other "goodies" on marketing topics that you can download for free.

Audio Files

Audio Files in Real Player format on various talks I've given, including a 2 hour Tele-Class on "Audio Logos."

InfoGuru Support Forum

Discuss issues and get support for your InfoGuru Marketing. Click on this link and join this very active online discussion group. Once you are a member, use this link to connect directly to the InfoGuru Support Forum.

You can also go to the **Home Page of the InfoGuru Manual** to access these links at http://www.clientmagnet.com/infoguru. You must have the access codes to get into the site.

Appendix

Materials to Support Your Marketing Efforts

Actual marketing samples to support your marketing efforts

Each of the samples below are taken from actual marketing materials used by my clients or myself. They can act as templates for your own marketing materials. Make sure to adapt them to your own particular situation.

Target Prospects One-Pager

This is a sample of a one-pager from my client Brien Palmer in Pittsburgh, PA. Brien told me that the first time he showed this to someone he got a lead the next day. Clearly defining who you serve is one of the most useful (and simple) marketing things you can do.

OUR TARGET PROSPECTS

Target Prospects

Executives and owners in high-tech growth businesses in southwest PA.

Signs of Need for Our Services

- Frustration
- Constant fire fighting
- Lack of teamwork
- Stress
- Burnout
- Disorganization
- Worries about sales
- Motivational/morale problems
- High turnover
- Customer complaints

Target Sectors

We serve all sectors but feel that the following have a higher likelihood of being qualified

1. High-technology companies, such as Marconi, Maya Designs, iGate companies (eJiva, emplifi, etc.) Be Free and Janus
2. Family-owned businesses, such as Hefren Tillotson, Hanlon electric, Biondi Motors, Sargent Electric, etc.

Our Value Proposition

We help companies develop the management systems and leadership skills necessary to support their growth and longevity.

Specific Services

- Strategic Planning
- Leadership and Organizational Development
- Human Resource Systems
- Sales and Marketing
- Process Optimization
- Team building

Executive Summary from a Marketing Consultant

Geonexus Consulting

Geonexus helps technology companies achieve solid market growth for their products.

Are you struggling to develop markets for technology products?
Product marketing in technology industries is a challenge. You have to keep pace with short product cycles, product complexity, and changing market conditions. What's more, it's up to you to make sure your company is delivering complete solutions for your customers' business problems. The sales channel and your communications specialists are depending on you. They not only require a complete solution to talk about, they also need to be able to articulate clear positioning that demonstrates differentiation and value.

Approach marketing systematically.
If we had a more systematic way to conduct technology marketing then our path would be more sure. It would result in a better solution to customer problems, clearer differentiation, and leverage for sales and marketing communications.

Why does this happen?
Most of us learned marketing methods that were developed for stable business and consumer markets. But the complexity and changing conditions of technology markets require different methods for developing these markets.

An approach that's proven to work.
Fortunately, many new methods are being developed specifically for technology marketing. By applying these methods you can approach marketing more systematically. And this means you will be more productive, you will produce surer results, and make fewer mistakes.

We can help
Geonexus helps technology companies achieve market growth for their products. We do this by using methods developed for our industry. We can help you plan and implement an effective marketing strategy. And we can help you to develop marketing processes that leave your organization more capable when the project is completed. We've worked with many companies in Silicon Valley to analyze, plan, and implement product marketing solutions.

If you'd like to learn more about how we can help you more effectively build markets for your technology products, please call us at 650-321-6545 or visit the Geonexus web site at www.geonexus.com.

Technology Consultant Services Overview and Service Listing – EDPCI Technology Consulting

If information technology doesn't understand your business, how can they add value to your business?

- Sure, you need an accounting package and IT can help you select and implement that, but are they making you and your business more productive?
- How about the wasted effort when a new employee comes in the door and they can't get on the system for a few days while IT gets it together?
- How about that mission-critical project that has been dragging on and on, consuming time, money, and people and still not delivering the value you expected?
- Or what about that business process that just isn't working as well as it should and IT and the business can't seem to communicate about how best to improve things?

These are the kinds of problems we've successfully dealt with in the past and we can do it again.

Our experience tells us that every business is unique. Your people are unique, the way you differentiate your business is unique, your processes are unique, and your needs are unique. There are, however, common threads to every business. Based on those common threads, we can tailor our general approaches to fit the unique needs of your business and your situation.

Strategic Information Technology Planning

How can your Information Technology group add value to the business if they don't know what the business is all about? If they don't deal with business issues regularly? If they don't build relationships with the business community? The answer is – They can't. All too often, the IT group is isolated from the business community and thus isolated from the ways they can truly add value to your company.

True IT value is about meeting the needs of their customers – usually business users in the company and sometimes the business' customers themselves. Talking 'geek', failing to meet schedules or other commitments, refusing to have empathy with user complaints are hallmarks of a failed IT organization.

We've found that one approach to resolving this dilemma is to increase the communication between IT and the business. Our approach is to help you create an Information Technology Plan – the blueprint for what IT needs to do to add value. This is a five-step approach that steeps the IT department in short-term and long-term business needs and develops a plan for meeting those needs.

We start with an assessment of the current state of affairs: infrastructure;

people; perceptions. We then embark on a series of in-depth interviews of the business community by IT leaders. This starts the process of re-connecting IT with the business. In conjunction with these interviews, we review the factors that are driving technology and the factors that are driving the business. Using the result of these steps, we are then in a position to analyze where we are and where we need to go. Finally, our analysis leads us to an understanding of the desired future state, and what we need to do to get there.

The resulting Information Technology Plan is just another blueprint – one describing the direction that the IT group must take to increase their value to the business. After all , that's what IT is really all about – right?

Case Study and Testimonial – Ingraham Consulting

The following testimonial and project case study will give you an idea how Ingraham consulting approaches projects.

> "I have worked closely with Bruce Ingraham for more than ten years, and have always been delighted with his ability to see the big picture and help me solve my problems. He is able to provide expert guidance and thus help me understand the scope of a solution. He then implemented that solution in a timely, cost-effective, and user friendly way. His ability to sit down with me, look at the kind of problem I have at hand, and then choose just the right tool for the job, has made working with Bruce a pleasure. Taking the time to understand what it is we do is half the battle, and by providing expert consultation during the design phase of our efforts, Bruce has made a major contribution to overall project efficiency."
>
> Seth Michelson
>
> Vistagen

The Atkins Principle

One of my first jobs after college, back in the mid-1980s, was with a large California public utility. I worked in a group that was responsible for forecasting how many computers the company would need. We had monthly meetings where various departments would plead their case for additional computer resources. One month, a department sent an advocate to argue for DB2, IBM's new relational database management system. The rationale was that this particular department was tired of waiting for COBOL programmers to do ad hoc reports. With DB2's user-friendly Query Management Facility (QMF), people could do their ad hoc reports.

Another attendee at this meeting was Winona Atkins. As she listened to this line of reasoning, she started to fidget, then squirm in her chair. She finally couldn't contain herself any longer, and blurted out "What difference does it make if it's DB2, SAS, or something else? **At some point, doesn't thinking have to go on?"**

This department got it's way, the utility brought in DB2 at great expense, and the department hired a dozen DB2 programmers to do ad hoc reports. Nobody would believe before hand how much thinking was needed to use QMF.

This is the Atkins Principle. My job is to ensure that thinking goes on at your company. I try to protect my clients from making costly investments in technology when difficult analysis and policy decisions are really needed. The situation has worsened as more graphical user interfaces (GUIs) for relational databases become available, such as Oracle Browser, Cognos Impromptu, Quadstone, and Ceres, to name a few. The fact is that no matter how good your GUI is, thinking still has to go on in order to comprehend a fifty table database that is documented by a two-hundred page data dictionary.

Principal Biography

Diana Hartley is the president and founder of iCulture. She has made it her life's mission to investigate all areas of study about successful human performance and interaction. She knew early on that to create a better world, people had to understand themselves and how they related to each other. Her goal was to create a program that helped people work together more constructively and cooperatively.

Her passion for the study of culture was ignited by graduate classes in Cultural Anthropology at American University in Washington, DC. Quickly, she realized that culture was one of the keys to understanding how people performed in groups. Her passion for Cultural Anthropology became an on-going independent study and lifelong avocation.

The subject of communication became another passion. This led her to San Francisco State University where she received her BA in Broadcast Communications. She quickly learned that communication, when used properly, can opens doors to understanding. Further exposure to the world of broadcasting at KRON-TV fueled her commitment to empower people with information about the process of influence and the power of language. Communication was another key to effective group performance.

As a certified Master Practitioner of Neuro-Linguistic Programming, she studied in depth how the brain and mind influence human actions and interactions. She discovered that this knowledge was the last key needed to unlock the door to powerful personal and corporate development. Culture, communication and knowledge of the brain/mind became the building blocks of her program.

As a businesswoman, she used her entrepreneurial skills to create many companies from the ground up. These included: Executive Designs, a custom shirt designing service for executives, DHM Associates, a PR/Marketing company, Country Puppy, a pet product company that sold her exclusive products, More than Marketing, a business consulting practice for small business, and Transformational Communications, a communications consulting practice that helped individuals and groups work through their blocks to success. As an entrepreneur responsible for the creation of five service and consumer goods companies, she learned that the binding force of any company is its culture.

She developed an early version of Cosmopolitan Thinking and taught it to a diverse group of students. From business executives to inmates at San Quentin State Prison, the results remained the same: the information motivated everyone to reexamine and change their thinking and behavior.

She spent three years in the field learning the performance challenges of large organizations as a communication trainer and consultant for Decker Communications. She taught engineers, middle managers and executives to speak more powerfully. Through this experience, she was able to understand the issues of working and interacting in large organizations such as Microsoft, Cisco and National Semiconductor..

A great diversity of business experience over twenty years has honed her ability to perceive, communicate and teach people how to overcome obstacles in any circumstance. Her lifetime of study, years of experience and knowledge are the foundation for her groundbreaking program, Cosmopolitan Thinking.

Speaker's Package

I've used the package below for many years with great results. Remember to call first to identify the right person to send it to. It consists of:

- Cover Letter
- Overview and Bio Page
- What Clients Say

Cover Letter

To: Program Director
From: Robert Middleton
Subject: Speaking for your organization

Dear John,

In the past few years I have presented to dozens of Bay Area organizations on the topic of successful marketing and selling for service businesses and professionals. In the past year alone I have spoken to many Peninsula professional organizations such as IMC, PATCA, SCORE, NCHRC and the South San Francisco Chamber of Commerce.

Recently I did a presentation for ASTD in San Francisco and got this feedback:

> "WOW! What a great presentation. Just as I remembered, your approach is amusing yet thorough and grounded in useful principles. Your stories and examples were superb. They loved it! The evaluations were some of the best to date." Evelyn Moorman, Programs Director

If you're looking for a solid, yet entertaining program on how your members can more effectively market their services, I would be happy to provide a half hour to one hour presentation to your conference at no charge.

Attached is a sample write-up which can be used as-is or edited as-needed, a short biography, and comments from those who have attended one of my presentations.

I look forward to speaking to your group. If you have any questions, please call me at your earliest convenience.

The best,
Robert Middleton
Owner, Action Plan Marketing

Overview and Bio Page

Give complete information on your talk. They'll use this in their newsletter or email announcement.

Becoming a "Client Magnet"
The Art of Marketing a professional Service Business

Good marketing is magnetic. And good marketers learn how to draw clients to them with very little effort. To become a "client magnet" yourself you need to understand

and apply the core principles of "knowledge business marketing" and apply them to your business. This hands-on presentation will outline those core marketing strategies that work for your kind of business. You'll learn that marketing is not about flash, hyperbole and empty promises but about understanding the needs of your prospective clients and communicating your solutions with clarity. You'll be introduced to the 5 Ps of service business marketing:

Positioning – Communicating value through the solutions you are able to deliver.

Packaging – Expressing your expertise, ideas and solutions with clarity and impact.

Promotion – Using visibility to generate credibility, trust and, ultimately, qualified responses.

Persuasion – Listening deeply to the needs and aspirations of your prospective clients.

Performance – Making your clients feel they are the most important people in the world.

Robert will also share many successful marketing stories from the hundreds of clients he's worked with and demonstrate how these principles can apply to your business. You'll leave the presentation with ideas you can use and be inspired and motivated to take your marketing and your business to a whole new level.

About Robert Middleton

Robert Middleton founded Action Plan Marketing in 1984 to help small businesses more effectively market their businesses. Robert's specialty is marketing for service businesses, professionals and consultants. He has consulted with more than 400 independent businesses and helped thousands more through talks, seminars and workshops. Robert brings a wealth of practical information to his clients, helping them to develop the techniques and strategies that consistently attract new clients and close more sales. He demonstrates that you don't have to be a marketing or sales genius with a huge budget to market your business successfully. Through examples and stories, you'll learn hands-on techniques you can use RIGHT NOW to attract new clients.

Robert has spoken to dozens of Bay Area associations such as the Commonwealth Club, the Harvard Business Forum and the American Society for Training and Development as well as many Chambers of Commerce and professional organizations. His presentations consistently receive rave reviews for the practical information they contain and for his energetic and enthusiastic delivery.

What Clients Say

Testimonials really help you get speaking engagements.

"As a result of this session I was able to get three new clients in a three week period. And these are clients I know I wouldn't have gotten if I hadn't used the ideas I learned from you. These clients will pay me a total of about $2,000. That's a 6 to 1 return on my investment for this session!"

Mary Beth Shewan – Personal and Professional Coach

"Every time I see you, miracles happen and my business seems to mushroom some

more. I am busier than ever with clients and getting repeats now."

Patti Wilson – The Career Company, Career Counseling

"In the time we've worked together, I've gone from not even having a logo or brochure to now getting more work than I can handle from prospects that call me. And all this while working on opposite sides of the country!"

Brien Palmer – Brien Palmer Enterprises, Management Consultant

"Your marketing services were critical to our success in creating marketing XYZ Firm and direction. The Action Plan Marketing Strategy Sessions provided a means to clarify our image. To make things even better, you were able to work very patiently with four individuals who all needed to agree and be pleased with the results."

Corrine Keller – Heritage Estate Services, Financial Services

"The ideas from your marketing workshops and Marketing Flash eZine have helped me grow my business more than 20% each and every month for the past year. Thank you for the continued support and ideas!"

Larry Hedberg – Silicon Valley Telecommunications

"Robert helped me to craft a sales presentation which works 100% of the time. It's incredible, but in the past four years, the only two searches which I have not won have been the two times when I deviated from Robert's materials. That is a success record which is unmatched even by my own colleagues in my own firm."

Ann Peckenpaugh – Schweichler and Associates, Executive Recruiter

"You have dramatically improved my effectiveness and productivity at attracting and selling new clients. You developed professional printed materials for my use and also created a custom web site for my practice. My base of clients is growing and I am receiving more referrals."

Colleen Boyd – Internal Navigation, Management Consulting

If you'd like similar results, please give me a call!

Sample of a Query Letter for Article

July 7, 1999

Janet Brown

Financial Planning Magazine

600 Fifth Avenue

NY, NY 110998

Query – Win Clients Over Before You Even Meet Them!

Financial Planners need to build trust and credibility before they can establish solid client relationships. Creating a favorable first impression is a must.

Last year I helped a young and struggling financial planning firm court the senior citizen market. The problem was simple: the firm had no identity package. The problem was solved when my firm Action Plan Marketing created an image for the firm associated with stability, growth and firm roots: The ancient California Redwoods.

By XYZ Firming on image as an element of "identity packaging," I assisted the financial planners in developing a solid business identity prior to pursuing clients. There are a few fundamental principles of "packaging" that all financial planners need to understand:

- Correct business "attire" (logo, letterhead, envelopes)
- Marketing materials (brochures, testimonials, company bios)
- Service configuration (monthly workshops, coaching sessions)
- Personal presentation (confidence, competence, communication)

I would like to propose an article for Financial Planning Magazine about the importance of packaging for financial planners. This article will include examples and explanations, as well as providing a framework for immediate and effective action.

I have included my credentials, my marketing materials and some previously published articles. I have enclosed a SASE for your response.

Interested?

Robert Middleton

Sample Press Release

FOR IMMEDIATE RELEASE

For further information:

Robert Middleton 650 – 321-4449

BUSINESS MARKETING WORKSHOP SET FOR SUNNYVALE

(Palo Alto, CA) – (July 6, 1999) – A marketing workshop for owners of professional service firms has been set for the South Bay Area on Saturday, August 14 to be held at the Sunnyvale Hilton Hotel at 8:30 a.m. The subject: "How to be a Client Magnet – Positioning, Packaging and Promoting Your Professional Services" is for consultants, trainers, business coaches and other professional service businesses.

The workshop is being conducted by Robert Middleton, owner of Action Plan Marketing of Palo Alto California. Mr. Middleton conducts numerous workshops/seminars for professional service businesses in the South Bay Area and has presented talks on "service business marketing" for most of the local chambers of commerce over the past several years.

"There is a big difference between marketing a small professional service business than marketing a product, a retail store or even a dot com company," said Middleton. "While the principles of marketing are the same for every kind of business, we will demonstrate how to attract new clients by using techniques and strategies that are very effective while remaining affordable."

For further information you can visit the Action Plan Marketing web site, (www.actionplan.com) which also contains many valuable resources for professional service businesses such as over 60 articles on marketing, a marketing bookstore and a Marketing Scorecard to measure your marketing's effectiveness.

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Successful Direct Mail Letter

Confused About Internet Access for Your Company?

If you're confused about Internet access for your business you're not alone. We'd like to help by giving you a copy of our guide: Untangling the Internet: Simple Solutions to Connecting Your Company to the Internet.

With all the Internet options available to businesses, it's no wonder people are confused. Dial-up access, dedicated line access, ISDN, Frame Relay. What's the best connectivity option for your company? Are there really any simple solutions?

Email, World Wide Web, FTP, WAIS, Gopher. What Internet services do you really need? And is the solution to connectivity through an Internet Access Provider (IAP), an online service or perhaps an Internet server of your own?

Untangling the Internet will give you some very straightforward answers to all of the above questions. It will outline all the main options, the start-up costs, the range of monthly fees and the software and hardware required.

The guide is our way of introducing you to the services of AIS – American Internet Systems. Since 1978 we've been a network/email/Internet integrator who has built enterprise email systems and wide area networks (WANs) for such companies as Pacific Bell, Macromedia and First American Title Insurance Company. Our AIS Mail service is an all-in-one email Internet connectivity solution. It includes hardware, software, service and support and is designed especially for businesses who want to connect 50 or more computer stations to the Internet.

No matter what your situation, Untangling the Internet will make the Internet a less confusing place. To receive your copy, simply fill out and FAXback the enclosed sheet and we'll get a copy to you right away.

We look forward to hearing from you.

John Jones

President, American Internet Systems

Did this work? You bet it did. Their previous mailings got them 6 responses. This mailing got them 175!

Sample eZine Article

This is from one of my clients, Dan Quinn. If you can write articles like this to send out to your list, you're going to gain a lot of attention and credibility. It's great!

The One-Sentence Meeting: Getting Results Out of I.T.

Or

How the Money Gets Stuck on I.T. Whiteboards

I sat down in Jeff's office the other day – he's the I.T. Director at a client site – and I noticed that his whiteboard was covered from top to bottom with a list of initiatives. "What are these?" I asked.

"All my active projects," he answered, smacking his hand against his forehead.

Turns out that Jeff, with a staff of five frantic techies, has about 25 different projects going at the same time. Every day he gets a little bit done on a few of them.

How would you like your project to be on THAT list?

Sound like an IT professional you know? It doesn't have to be that way!

I took a deep breath, and said, "Geez, Jeff, it's not REAL surprising that Sidney (the CEO) complains that you never seem to finish anything."

With a hurt look he replied, "I just finished something yesterday." For the past week he'd poured most of his time into a single project: "Troubleshoot network crashes." Last week Sidney lost a document he'd been working on, and he headed straight to Jeff's office in the I.T. department for a one-sentence meeting:

"There is only one thing in your job description until this network is stable: fix it."

Sidney was acting like a CEO, a leader. And for Jeff, it was actually a relief. He stayed late with a network engineer for a few nights, and they got to erase it off the whiteboard. FINITO. PERIOD. DONE.

But by Monday, Sidney was back in Jeff's office asking about a couple of other projects, and Jeff was quickly back to doing a little here, a little there. This little here-little there approach wastes profits in two ways:

1. Staff time gets invested in projects that go nowhere. I've known companies that finally abandoned projects that were half done, many thousands of dollars later, just because nobody could stay focused on them.
2. The company fails to benefit from the projects that should be DONE by now.

With too many "Top Priorities," Jeff is acting like a confused circus lion, while Sidney drops into his office with yet another idea, essentially waving a chair in his face.

What I.T. Staffs Have in Common With Lions

There's a wonderful documentary called "Fast, Cheap and Out of Control," full of interviews with people who are obsessed about their jobs. The fanatic who made the most lasting impression on me was a lion tamer. You thought lion tamers hold out a chair to

poke the lion? Nope. (Probably good thinking there.) He's confusing the lion with four different targets. First the lion looks at one leg, then another, then a third. And while the lion is trying to decide which leg to lunge for, he gets confused, and gives up.

How to Have a One-Sentence Meeting

The answer lies with Sidney, the CEO. He keeps giving Jeff more things to do, and SIDNEY EXPECTS JEFF TO WORK OUT THE PRIORITIES ON HIS OWN. It's kind of a sweet deal for Sidney: he gets to have great ideas, and then get mad at Jeff when none of them actually gets done.

Sound like your IT department? Try The Eraser Exercise:

1. With your IT manager, visit every IT staffer in your department, and let them know that they need to jot down on paper whatever's on their office whiteboard, because you want the board completely erased by 5:00.
2. The next day, you and your IT manager sit down with each staffer to identify the ONE single project that is PRIORITY ONE. Have the staffer write that project on the whiteboard, and ask them to leave it up there, all by itself, until it's done. Also, ask the staffer to write down a due date next to it.

   You just had a one-sentence meeting.
3. Every day or so, take 60 seconds and stick your head in your staffers' offices, and look at the whiteboard, They may not understand that you're conducting one-sentence meetings, but everyone will notice you paying attention.

Watch your business start to enjoy the benefits of projects that are actually DONE.

Is That All There Is to Taming the Lions in IT?

No, of course not. Pretty soon your IT staff will start growling about what and who is disrupting the prioritization process. You'll have to step in and sort that out. But if YOU can't sort that out, how do you expect THEM to?

Wondering where things get bogged down in your I.T. department? Give us a call to learn more about our "IT 360" department assessment from all the angles: network, software and staff.

Here's what one recent customer in IT told his boss, after the Quinn & Associates IT 360 process: "I have worked with many consultants in the past including Arthur Anderson and Ernst & Young of the Big 5. Never have I seen the quality, level of detail and support that I did with this consultancy. [They were] great to work with, and eager to share information with a goal of handing off the project instead of getting in on the 'gravy train' which seems to be the norm of the industry."

Dan's web site: http://www.qua.com

Successful Email Letter

Hello!

My "Second Annual Free Marketing Workshop" is more than half full so I wanted to encourage you attend if you have not yet made a reservation.

Yes, I realize that many of my More Clients subscribers are out-of-state or even out of the country. Many have asked if I will be forwarding a workbook to those who cannot attend.

I can't do that but I am working intensively on a very affordable product that will incorporate all the material (and more) from this workshop that will be ready early next year.

The topic for the workshop, by the way is "Marketing Yourself as an InfoGuru – Action plans for attracting clients to your professional service business."

This is material I've never presented in a workshop before and it provides the keys to attracting more clients, better qualified clients, and better paying clients without cold calling, direct mailings and in many cases without networking (which you know I hate)!

None of the material in the workshop is "pie in the sky" or untested, in fact this is the method consultants such as Alan Weiss, Tom Peters and Jay Abraham have been using for years to attract more business than they can handle.

You'll learn both an overall strategy and hands-on techniques that will help you gain credibility and trust and have clients call you instead of you having to call them.

So if you're in the SF Bay Area, attend by all means, and feel free to invite your friends and associates as well. For those of you a little farther afield, be patient, because early next year I'll have something for you as well!

The workshop will be held from 9:30 a.m. to 5:30 p.m. at the Santa Clara Convention Center in Santa Clara, CA

If you would like to attend for free you must enroll by December 22. After this date, the tuition will increase to $95.

To learn more and to enroll just click on the link below: http://www.actionplan.com/freeworkshop.html

Once you enroll you'll receive a confirmation email plus directions.

See you there!

Robert Middleton – Action Plan Marketing

Did this work? You bet. I filled this workshop in about a week with 180 people.

Proposal to Develop Marketing Plan for XYZ Firm

Situation Summary

XYZ Firm has developed many pieces of the marketing puzzle but does not yet have a completely integrated approach to marketing. You are looking at developing a comprehensive marketing plan that can be successfully implemented in your firm.

Objectives

A well laid out marketing plan that provides guidelines in all 5 Ps of marketing:

Positioning – A clear articulation of who you are and how you're different and a way to express this is a large variety of situations.

Packaging – A plan for developing appropriate marketing materials including but not limited to a newsletter and a web site.

Promotion – A plan for developing and implementing various promotional vehicles including but not limited to: networking with existing clients and new prospects, speaking engagements, writing for publication, newsletters, direct mail and advertising.

Persuasion – An outline of your sales strategy.

Performance – A plan for building in feedback and developing channels of communication to prospective clients from current and past clients.

Measure of Success

You will be satisfied that you have a plan that can be reasonably developed and implemented by XYZ Firm. The priorities, accountabilities, allocation of resources and action plans will provide a clear track to run on.

Value

The previous year's revenues for XYZ Firm were $XXX. You believe that this is at minimum $XXX below your potential given the current market and your capabilities. Without a clear marketing plan it is unlikely that this goal can be met. It is the first necessary step in expanding your revenues.

Methodologies

My first task is to learn some more about what you have done and what you are working on in the marketing area. I also need to determine the interest, capabilities and capacity of your staff to take on various marketing related activities. Through discussion and brainstorming with you and your staff I will gather the necessary material to develop a plan as outlined above. The plan will be written with specific plans of action for each of the 5 Ps.

Timing and Scope of Project

I can start when we are able to coordinate and schedule an initial two-hour block of time to meet. From there we can schedule additional appointments with yourself

and staff members. This plan can be completed within a month of starting. If additional areas need to be considered for inclusion in this plan they will be looked at on a case-by-case basis.

Joint Accountabilities

My job will be to gather the information and assemble the actual plan. From you I will need information, materials and the time to understand your unique situation.

Follow-Up Implementation

Proposals will be developed by Action Plan Marketing for projects recommended by the marketing plan. Such proposals may include but not be limited to development of marketing materials, promotional campaigns and training programs. XYZ Firm is in no way obligated to work with Action Plan Marketing once the plan is completed but will evaluate and make decision on proposals as submitted.

Terms and Conditions

My fees are always based upon the project, and never upon time units. That way you're encouraged to call upon me without worrying about a meter running, and I'm free to suggest additional areas of XYZ Firm without concern about increasing your investment.

The fee for developing the plan detailed above will be $XXX. Approximately two thirds ($XXX) is due upon the start of the project and the balance ($XXX) is due upon completion and delivery of the plan.

Expenses (if any) are billed as actually accrued at the conclusion of each month, and are payable upon receipt of my invoice.

Acceptance

Your signature below indicates acceptance of this proposal and its terms

This proposal is accepted and forms an agreement between XYZ Firm, Inc and Robert Middleton of Action Plan Marketing.

Date: January 27, 2003

For Action Plan Marketing – Robert Middleton

For XYZ Firm, Inc. – John Brown

Playing the Game of Marketing Ball