In this audio program, Jerry Vieira discusses eight buying types to be aware of and how they approach business differently. The better you understand these types, the easier it will be to avoid the types who will be the Wrong Clients for you and to attract the types who will be the Right Clients.

Jerry mostly uses this system in relationship to consulting engagements, but in my experience, you can find these different types of prospects in any kind of professional service business.

I recommend listening to and reading this program more than once and then doing an inventory of prospects that are currently in your marketing and sales pipeline. Then determine which are the most likely to be the Right Clients or the Wrong Clients. If you do this, you will save enormous amount of time, effort and money in the marketing and sales process.


Today I’m interviewing Jerry Vieira of the QMP Group. The QMP group is a strategy and process-improvement consulting firm with a track record of rapidly turning underperforming businesses, divisions, products and services into significant profit contributors.

I met Jerry as a presenter at the Institute of Management Consultants (INC) Confab a few weeks ago. Jerry presented a model of buying types that I found both useful and intriguing. It filled a piece of the puzzle I wasn’t aware of previously, or hadn’t paid a lot of attention to.
Before we get started, tell me how you came up with your eight types model.

Jerry: We were looking at why our clients were buying and why they weren’t buying. We had a set of criteria for what a successful engagement was.

We looked at whether the client was successful, whether we had made reasonable income and profits for our efforts, whether the client was satisfied and we could depend on him to be either a repeat client or provide a referral, and whether there was any leverage or extraction we could get from the engagement like a new tool, process or capability.

Then we said, “Let’s look at all these clients and decide what is common among those engagements that are most successful.”

We looked at the vertical market. Were medical markets better than manufacturing markets? Were manufacturing markets better than software markets?

Then we looked at the title of the individual who was responsible for approving, managing and paying the invoices for these projects. We finally found that none of it really gave us any clues.

Robert: Basic demographic information was not the deciding factor of a successful project?

Jerry: Not at all. We had people who were enormously successful in software, wholesale distribution and electronics. Then there were people who were in electronics and software who were
completely unsuccessful in making the transformations required.

We said, “There must be something in the personality types of the individuals.” I looked at every invoice in my database from six years.

**Robert:** For six years? Boy, you really took this seriously!

**Jerry:** I’m an engineer, so I tend to be analytical and diagnostic. I put the name of the individual who was primarily responsible for that engagement, then sorted them by types. I said, “This person was like this person. These people were like these people.”

I ended up with eight different groupings. I had to think of some names that characterized these people. It was very unscientific. I thought, “This person will never do anything. This person is a Stump.” I didn’t call them Stumps right away. I said, “This person is really stuck in the mud. The acronym is STUMP, so we’ll call them Stumps.”

Then there were the type of people who, when you go to a client discussion, would say, “Wow, that’s really an interesting process. That toolkit is neat. Could you leave a copy of that behind?”

You’re torn. Will you leave it behind? You leave it behind, and they never call you again. Those were obviously Takers.

**Robert:** Then you find out from somebody else that they’re using it in their consulting.
Jerry: I went through and gave each one a name. “The-Boss-Made-Me-Do-It” were nefarious because they were the best actors in the world. You could have called them the Academy Award winners. They acted like they were interested.

The BMMDI became the Boss Made Me Do It. Those people would always engage until the boss’ attention and enthusiasm had waned. Then their enthusiasm and attention would wane.

Then there were “Opportunists.” I had one client where I should have known immediately. I rarely talk about negotiating price because of value pricing, but he told me right away that he never paid retail for anything, except perhaps occasionally food.

Robert: That’s a warning sign of an Opportunist!

Jerry: Those types never have the wherewithal to see it through to take your breakthroughs into their firms. There are other types who do.

Some of them were compelled to because they had no other choice, like the “Terribly Troubled.” Some were “Frustrated Drivers” who had been suppressed either through a family business or always wanting to drive to greater accomplishments.

The “Sincerely Growth-Oriented” were the best because they were committed to the long-term growth of a company. Those engagements went on for years, not because it took a long time to execute but because they were always looking for the next thing to continuously improve the foundation of their business.
Robert: As we look at these different types, we’ll discover that four of the types are people who are not great to do business with in the first place, one is marginal and three are quite good.

Let’s talk about the main way an Independent Professional, like an independent consultant or a coach and other professional service businesses, can use this model in their marketing and selling.

Jerry: It brings reality and an understanding of how healthy that business is.

Most people have a pipeline, some kind of a sales funnel that they have opportunities in. You’re led to believe on an optimistic side that it can produce a certain amount of revenue, and that this opportunity has some real potential. Every opportunity should be an opportunity for repeat clients, referrals or leverage.

If your sort by these types, it’s a rude awakening and frightening when you realize that your pipeline or sales funnel is really not as healthy as you would think.

You’re constantly looking for new long-term clients because you spent a lot of effort trying to land clients who were less than optimum in their approach to business. That’s why we call this the ATB or Approach to Business Scale.

Robert: It’s their approach to business that you’re categorizing.

Jerry: You have to be careful. The Stump doesn’t really know he is a Stump. If you confronted an Opportunist and told him he was
Robert: The idea is for us to distinguish between these types.

We call the pipeline the Marketing Ball Model in Action Plan Marketing, where you move people around the bases. You get their attention and interest and give them information up to the point where they’re ready to engage in the selling process. It’s really the same thing.

I’ve seen people waste a huge amount of time with people who just are never going to buy. Yet, as you say, we’re optimistic. We think it will work. We keep giving them more information and talking to them. It just peters out or turns out to be a very small engagement or not a very successful one.

We can use this to understand these different types and where they’re stuck in the model. We can save a huge amount of time and energy because we won’t be putting all that follow-up energy into working with them. We can put the energy into working with people who have the greatest potential.

Jerry: Probably one of the greatest frustrations is the Stump. As a consultant, you probably have a much deeper insight into what a client needs than perhaps he does himself. You get frustrated because you see an enormous gap between the performance of an organization and what it could be only if they engaged you to help them find better ways or to deploy better ways.

Robert: We can see huge opportunities, whereas they’re seeing from their old perspectives and not moving forward. We know we can make a huge difference.
Jerry: However, they’re a Stump.

Robert: That’s STUMP, or Stuck In the Mud People. Let’s talk about some characteristics of those people. Who are they? How do we recognize them?

Jerry: You recognize them by their apparent satisfaction with the status quo. Many times, they’re small business people who have lifestyle businesses. The sales flywheel is constantly turning. They’re risk adverse.

They’re comfortable because they have their own company car and golf club membership. They might be a sole owner or an owner with a couple other members of the family.

You can look around the office and see that much of the technology is outdated. They have stretched the capabilities of their employees beyond their educational or experience level. They haven’t spent much time in training.

They’re a little bit like Opportunists. They’re trying to extract as much out of the business as they possibly can with minimal investment.

They’re also afraid that, if they do try to make any change, because the grip and capabilities of the organization are so tenuous, that they’ll actually break something.

None of it is because they’re malicious. They’re mostly driven by fear of somehow damaging the golden goose that’s giving them their lifestyle.
Robert: These people are very risk adverse.

Jerry: Yes, very risk adverse. You might occasionally run into someone who believes everything is good. Why do they need to change because everything is good?

It’s been my experience that, at the heart of it all, they’re risk adverse. They’re afraid to break something that is giving them their comfortable lifestyle.

In a larger corporation, that can be a general manager who is comfortable with what’s going on and no one is pressuring him from the next level above. Some companies allow divisions to run completely autonomously.

Robert: Why are you talking to someone like this in the first place? You’re talking about getting to the level of the marketing and sales process where they’re saying, “Robert, I think I need some help.”

Do they ever ask that question? What tends to happen in the sales process and your interaction with them that gives you a clue that these people say they’re interested but they’re not?

Jerry: Many times they don’t. Occasionally it will be a referral. Somebody says, “You need to talk to ______. They haven’t moved for a long time. They’re stuck.”

An individual might give you some time to talk, and as you look around, you start to drool because there’s enormous opportunity here!
Robert: There are so many things they’re not doing or taking opportunities for. So many possibilities, but as you say, they’re stuck in the mud.

I think it’s interesting that you say these are often referrals. It’s great to get a good referral, but then you get a referral to someone like this. As service providers, we say, “I did great work for this person. They referred me. It looks like a shoe-in,” but that’s not often the case.

Jerry: You may also find that sometimes curiosity will allow a person to talk to you. People will blend between Stumps and the next level up, which are Takers. At least Takers have some curiosity to steal something of value!

Robert: Before we get into Takers, let’s talk more about Stumps. Stumps can waste a huge amount of your time in some cases, perhaps not as much as the Boss Made Me Do It. Do you ever end up selling a stuck in the mud person? If you do, can you succeed with them? What do you have to do? Is it possible or is it someone you should run away from as quickly as possible?

Jerry: You shouldn’t necessarily run away, but you shouldn’t live with endless hope that someday they will see the light of insight shining upon them from the heavens and they will suddenly embrace all of the wonderful things you could do for them. Don’t waste your time. It’s just not going to happen.

Occasionally a Stump can turn into a Terribly Troubled. Then he drops back to an Opportunist and usually then back to a Stump. Being a Stump is a very stable state.
Robert: I talk about the marketing mindset. If I’m a consultant or service provider, I have a particular mindset about marketing that affects my behavior. With these eight types, we’re talking about eight different types of mindsets, right?

Jerry: That’s well said.

Robert: Unless you really understand, see, observe and are willing to change that mindset, it’s pretty much always going to flip back to the default position where it’s always been.

It doesn’t mean these are bad people, or they don’t have some good things. They’ve brought their business to a certain level, but it’s just not a great person to work with. These people who are frustrating to work with.

Jerry: Yes, they are frustrating to work with, yet they don’t get why you feel frustrated. Your frustration is wasted on yourself.

Robert: I think of these as the people where you give them one thing to do and they do minus five things. “If you could get a list of these people together by the next time we meet, then we could look at some of these opportunities.”

They say, “I really didn’t have time to get around to it. They’re pretty good, but I think we should be focusing on something else,” for anything you suggest, even something pretty basic.

Obviously I’ve worked with a few of these people, so I know what you’re talking about. Nothing really moves forward because any forward movement represents risk. They don’t like risk. If they just stay safe, then it will be fine. Ultimately the engagement peters out in many cases.
Jerry: One of the things hidden here is that an organization led by a Stump may have someone somewhere just beneath the Stump who is a Frustrated Driver. It is the breeding ground for a Frustrated Driver.

Maybe the Stump is the senior member and the Frustrated Driver is the daughter or son working in the business. Once the Frustrated Driver takes over, it can have an enormous reactionary impact.

You have to remain engaged to a certain level and keep your eyes open for a latent opportunity or approach within the organization that could become influential someday.

There’s a story about gold mining in Nevada. The mine kept collapsing. They called the mining engineer. He walked up to the mine, went in and advised them to shore up the reinforcing beams so the mine wouldn’t collapse any longer.

He asked the mine superintendent, “Do you mine for gold here?” The guy said yes. He said, “How are you doing?” He said, “Not very well.”

The mining engineer said, “You know all of that bluish-green rock you’ve been tossing outside of the mountain to get to the gold? That’s all silver ore. You really ought to be mining for silver.” That’s the story that kicked off the discovery of the Comstock Lode.

Even though you’re really digging to find an opportunity with a stuck in the mud and it’s frustrating because you know there are opportunities, just be aware that there may be some raw silver
or a Frustrated Driver who may come to influence and power in the organization at some point in the future.

**Robert:** You might tap into something to move that person forward who does want to change and is motivated, even though that’s not the dominant part of their personality. It might take a lot of prospecting to do that, though.

You want to look out for those Stump characteristics and not put a huge amount of time and enthusiasm into trying to turn them into a client because it just won’t happen. It can be frustrating because you can see all that gold beneath the surface, but they’re just not interested in mining it themselves.

One of my sayings is, “The people who need you most are the least likely to use you.” We’re really talking about the Stumps there. “The people who need you the least,” who are the Sincerely Growth-Oriented people, “are the most likely to use you.” It’s paradoxical.

**Jerry:** The Sincerely Growth-Oriented are always looking for encouragement.

**Robert:** Sometimes we think, “They’re so smart. They’re looking for opportunities. They’re working hard. Why do they need us?” They’re great people to coach. But we’re getting ahead of the story.

We want to talk about a few of the other ones who aren’t so good. Let’s look at Category 2, the Takers. What are some characteristics of Takers? Who are they? How do they behave?
**Jerry:** I haven’t run into too many Takers. Maybe I’ve just been fortunate or naïve. I have a tendency to want to share. I’ve always said I could give some of my training manuals behind with a prospect or give them away for free, and they would probably find a permanent position on someone’s bookshelf and never be opened again.

The Takers have enthusiastic ideas about how they can apply a tool. Many times the subtleties, expertise and experience of the consultant really help the tool get used in its most effective way. Takers basically frustrate themselves.

For example, QMP has a number of tools for market strategy. We have a strategy alignment tool that looks at the various factors and dimensions to make sure they’re all in alignment, which is a very common oversight even in very high-tech companies where they believe they’ve analyzed to death.

I could give that to a Taker without any worry that he would be able to effectively use it. If he gave it to someone down in the organization and said, “Here’s a neat tool. Go use it,” they wouldn’t know how to use it either.

Takers are like the extremes of Opportunists. They know there is value they could be getting, and if they can get it for nothing, you’re the fool for giving it to them rather than them being the unethical person for taking it. They tend to project your lack of commonsense rather than identify it as their unethical behavior.

**Robert:** They’re not really serious buyers. One of their characteristics is, “I can do it myself anyway, so why do I need him? He has a basic tool.” They don’t see that tool as proprietary. They just
think, “Oh, it’s just a tool. Why couldn’t I use it? After all, there are a million books with all these things.”

They have an eye for interesting tools, techniques, strategies or approaches and want to take it to do it themselves. Yet they probably won’t succeed in most cases.

Jerry: I’ve never heard of a Taker who has taken my material and actually succeeded by using it. There are Opportunists who will suddenly show up on your radar two years later and say, “Oh, by the way, do you know that small engagement when you gave us that tool? We used that two years later, and it was just fantastic. It really helped us out.”

I can’t think of a single time that I’ve run into a Taker who has been successful. They fool themselves and live with a certain amount of delusion.

Robert: Do Takers ever become clients?

Jerry: I’ve never seen one.

Robert: You’re wasting your time if you keep giving them more information because they just won’t use it.

One of my principles in marketing is to give stuff away. Often people say, “Robert, if you give that away, won’t everybody just take that and use it themselves?” I say, “Almost always never because they can’t really apply it without me, but there are some people who think they can.”

If you’re having that kind of conversation where they say, “Can you give me that? Can you leave me the workbook?” realize that
it is not necessarily an indication they will move forward and work with you. They just love to take a look at this stuff. Even giving it to them probably won’t damage you a heck of a lot.

Jerry: I’ve never recognized that it has damaged me, at least not from the Takers. The more nefarious ones are the Opportunists because they are willing to invest a certain amount of money. They lead you to believe that there is more.

They can string you along forever because there was some gold in that mine, just enough to keep you coming back and digging a little bit deeper.

Robert: I recognize Takers in that I send an ezine out to a lot of people every week. I think we don’t hear from Takers in many cases because they’re working in a solitary way. They read the ezine, get ideas and try to apply some things, but it’s unusual for them to go to the site to actually buy something for $39.95 or $100. They just want all that free information.

So often we just don’t hear from takers. They can’t see the possibility of doing business because, after all, they’ll just do it all themselves. Those are obviously people you don’t want to spend a lot of time engaging with.

Jerry: I want to make a clarification here because it’s important to know. If Stumps never buy and Takers never really buy, how did I do the analysis? I said I went back to look at very invoice. I also looked at every proposal that was not accepted. I classified them so I would take into consideration the dead-ends.
Robert: For Stumps and Takers, you probably want to even avoid getting to the proposal process. If you know enough about them and can see the writing on the wall, why even go that direction?

Jerry: Sometimes the proposal does more damage.

Let’s say you left the tool behind for a Taker. They ask for a proposal. Now you’ve not only given him the tool, but you’ve given him the roadmap for the deliverables and the milestones he would need to do himself. It’s not that he would, but now you’ve given the whole package away.

Robert: It’s an indication when they’re really in a hurry to get the proposal and want a lot of details. Once they have it, they stop returning your phone calls.

We wonder, “What did we do wrong? They sounded so interested,” but it’s simply a matter of the type of person they are. They’re just not good buyers.

We often say, “What could I have done differently?” but what you could have done differently was to not do the proposal in the first place, knowing that the chances are very slim. You have to do much more serious qualification upfront.

Jerry: The ethics of the Takers are the most questionable. A Stump is just a Stump. There’s no malicious intent there.

You would hope a Taker would tell you, “I saw that chart. I can’t possibly afford your services or risk the organization. I can’t follow through on the proposal.” You want some closure, sincerity and honesty. That would make you feel better about a Taker.
Like you said, and you had it right on, one of the first indications of the difference between a Stump and a Taker is that a Taker just won’t ever respond to your phone calls once he has what he needs.

**Robert:** One of my Action Plan Marketing coaches recently closed a client, started to work with them, then said, “Should we also get these workbooks as well?” He said, “Sure, you should get those workbooks to augment the work we do together.”

They bought my *Info Guru Manual*, then they called him and said, “We got this. I don’t think we need you anymore, “and ended the engagement! The chances of them being successful in what they needed to do just by reading the manual probably wasn’t really high.

That may have been an Opportunist, but definitely a Taker mentality.

**Jerry:** That person falls heavily into the Taker side, even though he started as an Opportunist. He was a closet Taker.

**Robert:** One of the things I want to keep underlining is it’s not just about knowing who’s good to work with and who’s not good to work with. It’s realizing the huge amount of time, effort and money we spend chasing after the wrong kinds of clients.

If we could more clearly discern the best clients for us, we would save huge amounts of time and energy, which we could put into much more productive marketing activities. If you went back and calculated the time you’ve wasted with people who weren’t going to buy, it would shock you.
Jerry: My personal biggest challenge is Opportunists. They are, by far, the most frustrating to deal with. When I did the analysis, I found that actually 25% of all revenue out of that six-year period was generated by Opportunists.

Robert: Let’s get into the Opportunists, then we’ll come back to the Boss Made Me Do It. Tell me about these scoundrels.

Jerry: An Opportunist is smart enough to know that there is real value, and also smart enough to know they can’t do it themselves. They feel that, if they only just had a jumpstart, they could carry it on for themselves – if they only saw how it was done. Basically it’s, “Show me how it’s done, then I can take it on from there.”

They attempt to find the smallest common denominator or the smallest chunk of service they can buy that they believe they can replicate. They’re hoping that a small injection for a short period of time will help them overcome whatever barrier, challenge or problem they have.

They usually miss that lack of follow-through and commitment to a change in the way they do business. And that will be the kiss of death. You can’t just inject a new idea and hope that somehow it will take roots on its own.

Robert: They don’t realize the amount of work it will take. They think that somehow they can take a little and just make it work themselves.

Jerry: They think their organization will embrace a little injection of a new idea or process enthusiastically and run with it. Then they
step back and say, “Well, gee, that didn’t work.” They didn’t set expectations, accountability or follow-through. They become disappointed with the lack of progress.

Robert: Is there a little bit of idealism in the Opportunist?

Jerry: No, they’re a little bit like Takers in the sense that they consider it’s just a sly, economic, sound, minimal investment for maximum impact. They’re always looking for the hot edge. You could also call them gamblers. They want a big hit for a little investment.

Robert: They probably keep jumping from one thing to the other.

Jerry: Absolutely. It’s typically program du jour.

Robert: I hate to say this, but I see some of myself in the Opportunist! I see how I’ve made some mistakes that way. I read a lot of books and hoped I could get the next answer from a book. Is that typical of an Opportunist?

Jerry: It depends on how you do that.

Robert: We hate to admit that we could be that way, but I’m sure we all have a little bit of ourselves in all of these. I like to see myself as the Sincerely Growth-Oriented and think everybody does.

Jerry: Let me clarify and give you a bit of perspective between the Opportunist and the Sincerely Growth-Oriented.

Let’s take your example of reading a book to get an idea. A Sincerely Growth-Oriented person reads a book, gets an idea
and says, “There’s a concept, or chart, on Page 237. There’s something else on Page 153. These are great ideas.”

The Opportunist will take those ideas and try to do something with them. When they don’t work, they will just leave them on the shelf.

What a Sincerely Growth-Oriented person does is take those ideas and say, “How can I build those concepts into this larger process or model I’m working on, because it enhances the model?”

Long-term success is not any one big thing, but 10,000 little things. If you extract from what someone gives you or what you read and continue to integrate, combine, blend and weld it into a bigger, better, more efficient structure or plan, then you’re a Sincerely Growth-Oriented.

A CEO who is Sincerely Growth-Oriented wants to put in a Six Sigma set of disciplines, or more efficient IT communications. He’s extracting little pieces and building it into an integrated whole that builds an enormous foundation for the future.

**Robert:** They really understand investment. An Opportunist looks more at expense.

**Jerry:** That’s a very good way to put it.

**Robert:** I see this in a lot of people. This course will cost a certain amount of money and they say, “Well, I can’t afford that,” or “Could you do it for less?” They’re not doing the calculation of, “If I integrate all of this, the potential return on my investment
could be huge.” They just look at, “What is it costing me right now?” An opportunist is rather short-sighted.

Jerry: That’s another excellent point.

The initiative you’re trying to deploy is $80,000 and the economic benefits model shows that in five years, the client will garner $600,000 in terms of bottom-line profitability. The Sincerely Growth-Oriented says, “That’s a good value. We can do this.” The Opportunist says, “Can you do it for $40,000? What can I get for that?”

Your concept of one being focused on expense and the other being focused on return on investment is very valid. As I talk to you, I can conjure up the faces of my clients who fit these characteristics immediately!

Robert: All of us might have a touch of Opportunist in us. If you’re working with bigger companies, hopefully they have a bigger vision than that. If not, they really won’t grow very successfully. Things will go through fits and starts. They’ll be dissatisfied. That can be not so fun to work with.

You made the comment that you can’t totally turn away Opportunists. Sometimes you have to take them on as clients. After all, they are motivated to get something done.

If you get an Opportunist as a client, how can you work with them most successfully?

Jerry: It’s kind of like judo. You have to use the momentum of the Opportunist. The Opportunist will look for the smallest common denominator to buy some services. If you can
fragment your own offerings to provide one-day workshops, for instance, that inject some of the basic concepts into the company.

The Opportunist can say, “Well, I can’t take my whole company through a complete marketing and sales transformation and adoption of the QMP process or end process. Is there any way I can do it?”

You can say, “As a matter of fact, do you have a handful of people you might be able to send to learn the toolkit and walk away with the manual?”

That is delicious for an Opportunist. Instead of going through a $100,000 one-year transformation, he can send two of his key people to a two-day market strategy workout for $3,000 for the both of them, instead of having to pay $80,000 to go through all of this pain of a long-term engagement.

**Robert:** You’ll get a client who is at least satisfied at a certain level. The people he sends may or may not be able to implement that in the long term, but they’ll probably do some good.

It’s better than nothing. That can grow into something a little bigger later on with more people going to the workshop or you coming to do it in a bit more depth.

**Jerry:** The circumstances could change. One of the people who went to that class could get promoted to the head of a department or division. He could say, “This is good stuff. I really liked it. Why don’t you come help us deploy it throughout?”
Robert: Something I always talk about is the downfall of training. Early in my career, someone said training was “dip and pray.” You dip people in the training and pray something happens. But the Opportunist is too optimistic that the training will transform everything.

Jerry: It’s the gambler’s mentality. “I’ll put a little bit in, and maybe I’ll hit the jackpot.”

Robert: As a service provider, ideally we’re going for making a difference in the organization, not just selling this here and this there just because it sells.

Ultimately, not a lot comes from that. That’s not very fulfilling and satisfying. “We sold a lot of training, but did it make any difference in the company?” “I don’t know.” I’ve heard that so many times.

Jerry: When I talk to an Opportunist, I can say, “I understand you’d like to have a few people get the concept and see how it works then maybe immerse yourself more in the process or adoption.”

In the back of my mind, I know for sure that because they’re Opportunists, they won’t really do that, but I say, “What really happens is that you put an individual through training. He’ll come back enthusiastic, but his enthusiasm is diluted in the milieu of the whole organizational preoccupation. They’re preoccupied with a whole bunch of other things.”

Robert: They’re carried along with the prevailing stream. It’s hard to get your head above the water.
Jerry: It’s very difficult for that individual who went through the training to say, “I’d like to call 70 of you together to tell you about these wonderful things I’ve learned so we can all be on the same page and talk the same vocabulary.”

I encourage Opportunists, if all they really want to do is training as opposed to embracing a significant change, to train as a team so everyone has the same language.

Occasionally I’ll get someone to say, “You’re right. We really ought to train the team instead of just a few people,” but the natural gravitational pull of the Opportunist is to get one or two people to test it out.

Robert: Then who knows where it will go. I think everybody gets a sense of who Opportunists are. I want to get into the kinds of things an Opportunist will typically say that will tip you off quickly that they are an Opportunist. Then you can dig further and validate it.

Jerry: One of the skills an Opportunist has developed is to really get to the heart of the matter. They could be great fractional mathematicians because they really can get to the lowest common denominator quickly. You’ll hear this kind of thing: “Do you have something that’s more of a bite-sized engagement we could go after?”

Robert: The bell should ring when you hear that!

Jerry: If they say a “bite-sized piece that we might engage with,” the first thing you know is that they don’t have a critical thing going on that they have to toss away all caution and engage in
something quickly to fix it. There’s no sense of urgency. There’s no real compelling need.

Once you combine the fact that there’s an Opportunist and a non-compelling need, then they have plenty of time to try it in bite-sized chunks. Or they’ll say, “Is there a discount if we send three people?” Immediately your eyes roll and you say, “Oh, my goodness. Now I know what I have here.”


Jerry: An Opportunist will say, “We went through that strategy workshop with several members of the team. It was really great. I’d like to ask you a couple questions. Would you mind if I bought you lunch next Tuesday?”

Robert: In other words, they’re trying to get some free consulting without any commitment.

Jerry: In that 25% of my business that comes from Opportunists, I haven’t included the number of french fries I’ve eaten! I don’t consider that compensation.

Robert: If they’re going to do this, they’d better take you out to a really nice place!

Jerry: There are occasionally people who masquerade as Sincerely Growth-Oriented who are really Opportunists. When we get to the Sincerely Growth-Oriented, I’ll give you several examples of how you may be fooled by SGOs who are really Opportunists.
Robert: I’m sure we have all encountered Opportunists along the way. It can be frustrating. We wonder why they understand the concept of all this great stuff but never commit to anything big. It seems like they’re missing the boat, but that’s just who they are.

Jerry: You have an Opportunist in your customer base if they bought something four years ago and keep calling you, but you haven’t sold them anything since.

Robert: They think, “I paid you for that. Doesn’t that mean I keep getting endless consulting from you?” or, “I spent a few hundred dollars, or a few thousand dollars, once.” You have to be willing to be straight and tell them. “This is how it works.” Either they’ll go away or pony up.

Let’s go back to the famous Boss Made Me Do It types. Who are these people?

Jerry: I know how I usually run into these people. I’ll give a lecture to a group of 10 or 30 CEOs on the topic of, “Increasing the Economic Value of Your Business While Optimizing Your Marketing and Sales Expenses.” It’s an appealing and intriguing title to a private-business owner of a $50 million or $80 million business.

He may say afterward that he would like me to come and talk to him and his marketing people and his financial person about this. “I’d like to know how you go about this. I’ve seen some of the tools you’ve shown in this lecture. It’s really intriguing. Why don’t you come by?”

Robert: That sounds good on the surface. They want to know more.
Jerry: You believe you either have a Terribly Troubled or an SGO at the CEO level. You have that discussion and you may even agree to an engagement. You may agree that a particular division or product line is having trouble.

The boss wants the head of marketing and sales to work with you to set a strategy. You begin to work with the BMMDI, the second in command.

But what you may find is that the BMMDI is not always available for meetings, doesn’t always have his people handle the action items and perhaps doesn’t hold people accountable in setting expectations for the team. It’s tough to coalesce working sessions or checkpoints around that.

Robert: In other words, there’s no commitment behind what he’s doing. He’s just going through the motions.

Jerry: There’s absolutely no commitment. It would be interesting if they were Opportunists because they might say, “This is an interesting project. It’s off budget. It doesn’t detract from our budget. This is an opportunity for me to grow my business quickly. By the way, I can’t lose because if it doesn’t work, my boss made me do it. I have no blame.”

They don’t know how to turn it into a real opportunity. If a BMMDI was an Opportunist, then at least you’d have something to work with. The lack of commitment of the BMMDI combined with the lack of follow-up or engagement of participation by the CEO starts to be recognized and observed by the rest of the people on the team.
Their interest and enthusiasm is not there as well. They have other things to do. This is extra. “It’s foreign to me, and I don’t understand why I should do it.”

You may even get to an end deliverable or final report or have gone through some training or strategy redo. If you go through a strategy redo, that document or action plan is going to sit on the shelf.

The CEO, who isn’t always an SGO, might not be following through and holding people accountable to make sure there are some real results.

We’re trying to accomplish all of these wonderful things, like a satisfied client, a referral, a success and economic longevity for this relationship, but a BMMDI is nefarious.

I can think of one particular case where a CEO requested a general manager of the division to get involved. The general manager was not a marketing or sales-oriented person. He just waved his official wand over it and said, “This is a good thing to do. Let’s go and try to do it.”

Because there were no checkpoints, follow-through or commitment, there was no long-term positive impact. I’m sure those manuals and tools are sitting on someone’s shelf gathering dust.

Robert: You’ve made some money, had an engagement and done what you’ve done, yet it’s again not very fulfilling because nothing really happened. It wasn’t a successful engagement even though you’ve done your best because there wasn’t the commitment.
I think it would be pretty easy to recognize this. Something gets passed on from someone who is committed to someone who is not, and you start to see the warning signs in lack of follow-through and commitment. That’s the writing on the wall.

Can you do an end run on this? If you get passed on to someone, how can you make sure they will be committed and not a BMMDI ahead of time? Can you say, “We really can’t proceed unless these particular conditions apply?” Is it possible to pull it out of the fire?

Jerry: I try to set a series of ground rules. The first ground rule is that we will never have a meeting; we will only have a working session. “Meeting” isn’t allowed in our vocabulary.

Every working session is targeted at making progress and ends with a series of action items that are focused on the most significant barrier we’re facing in making progress. There’s an action plan. It also ends with a time for our next working session.

We work as a team with frequent checkpoints, accountability expectations, details and a set of covenants that we will only have working sessions that will end with action plans and a schedule for the next working session.

Robert: I call it holding their feet to the fire.

Jerry: We expect them to hold their feet to the fire. If you can’t get an agreement with the BMMDI that that is the way he wants to run the business, or he gives you lip service to that, you have a responsibility to confront him and say, “We really need to do
this. The boss made you do it, so you might as well do it successfully.”

Perhaps it’s a personal style of mine, but I am not shy to constructively confront that progress is not being made.

Robert: You can’t go into your own fantasy world and say, “They’re meeting and talking. Something is happening.” You have to have a reality check all the time with these people.

I’d like to throw in an extra one here, which I think you’ll find interesting. A lot of my people are consultants who are very small businesses and often work with individuals. Coaches, for instance, work with individuals.

There aren’t a lot of BMMDIs because there isn’t a big hierarchy that you pass down, except in one case, which is the referral from the spouse. It’s a similar case.

I had a client who said, “My husband really needs your help.” They were motivated and a good client, but I’ve had some people send me their spouses who would have rather been anywhere else on the planet instead of meeting with me.

It would have been best for me, after the first meeting, to say, “You’re not committed to this. It’s really not going to work. Thank you.” Instead, we had these meetings that never went anywhere. They’d never do their homework. They’d never do anything. They’d be late.

Watch if somebody like that sends you their spouse. That’s a mini version of a BMMDI.
Jerry: Don’t ask me about history of spouses. I’m not an expert in that. In fact, my track record is probably the opposite, but I can tell you this. It’s difficult for a spouse to recommend anything to the other spouse, no matter what side it comes from, without it being perceived as criticism.

Robert: It could be a different thing if the spouse says, “Wow, I love what you’re doing. I’d love to work with him as well.” Then they’re motivated. That happens as well.

“Your business sucks. Do you want to go see this guy?” won’t work.

Jerry: However, if you’re able to externalize the challenge and say, “I’ve observed that the business is not making progress in these three areas. What do you think the benefit might be of trying to talk to someone about whether we can make progress in these areas?”

That way you can at least get a first recognition that some external problem exists that needs to be addressed, rather than focusing on, “You’re really pretty incompetent. While I love you dearly, you really need to fix yourself.” That is not something that any spouse needs to hear from the opposite side.

All I would recommend is starting with the externalization of the problem and a consensus that it needs to be worked on then saying, “Let’s go talk to Robert to see if he might be able to help us. What do you think?”

Robert: Another insight I’m getting about this is in a way, BMMDI are not really sold. We assume they’ve been sold because they’ve
been passed on by someone who has been sold. The boss has been sold. He's convinced this is good. Then he passes you on.

Something you can do with the BMMDI is to go through the sales process with them. You can say, “Let’s look at your objectives and challenges. Where do you really want to go? What’s important to you? What are you motivated by?” to get them onboard.

Often we assume that they’re sold because we were passed on, but that’s not necessarily the case. “Sold” means, “I’m committed and ready to go.”

Jerry: That makes a lot of sense. That’s a good, valuable, added perspective on this. If you suspect that there’s a BMMDI, another thing you might do is to negotiate with the ultimate boss for an economic or something other kind of reward for accomplishment of whatever the objective is.

Robert: For you or the BMMDI?

Jerry: For the BMMDI.

Robert: So he has more stake in it?

Jerry: Yes. It’s an incentive for him to actually follow through the detail.

Robert: It’s how you set up the game.

Jerry, we’re covering some great information. This is really valuable. We still have four more to cover, so we need to keep moving.
Our next category is the Dreamers. They’re sometimes called the Don Quixotes. What is a Dreamer like? Who are they as a prospect? How do they behave? How do you recognize them?

**Jerry:** Their enthusiasm and vision for where they want to take their business or themselves is very seductive. You can be fooled to think that, because their enthusiasm is so strong and their vision is so detailed and framed in such glorious terms, that if you put yourself into this airplane, you’ll get launched off to a wonderful future.

You can usually tell Dreamers because if you try to look back at their track record of deploying major initiatives with their company or with themselves, it’s not very good. In a working session with a Dreamer, and the Dreamer begins to wax eloquent about some concept and you’ll see eyes around the room starting to roll. That can be an indication they’re thinking, “There he goes again.”

**Robert:** They’re not exactly grounded, in other words.

**Jerry:** He’s trying to get us into something that he won’t follow through. We’ll have to sweep up after him. They can be dangerous. You can tell by whether or not there’s a past history of substance behind any other initiative they’ve undertaken.

Dreamers can have a tendency to chase butterflies. They’ll chase one concept then leave it alone for others to worry about. Then they’ll jump to another one.

I had a client who was bimodal. He was a combination of the Dreamer and Opportunist. He would find a concept he thought
had substance as an Opportunist and try to make it work with a little bit of investment.

Then he’d lose interest and go after this great new scheme for doubling the size of his business in three years. That didn’t work, so then he’d have to come back to get grounded in reality. His reality was to find another new investment he could make as an Opportunist.

I confronted him one day and said, “I’ve known you for many years now. I really want to see you succeed, but you’re having a struggle because you keep jumping between Opportunist and Dreamer modes. You need to do one of two things.”

I was very direct with him. “You need to somehow transform yourself into a Sincerely Growth-Oriented and do a thousand little things to help rather than any one big thing, marginal investment or gamble. Or become the chairman of the board and hire a CEO, who is an SGO.

“That way, your business will really gain significant value over the next three to five years, you can retire with your new Mercedes convertible and be much better off.

“If you continue this bimodal flipping and flopping, you’ll continue to struggle. But here’s the caveat. You can always be rescued by an economy that just goes through the roof.”

**Robert:** What happened?

**Jerry:** He was rescued by an upturn in his market. He’s absolutely delayed the recognition. In a very heart-to-heart working session, he said, “Jerry, I really took what you said to heart and
know I’m not a Sincerely Growth-Oriented. I know I need it.” This is the perfect opportunity. “Is there any way, with a little bit of help from you, we can overcome this problem?”

Robert: My impression of Dreamers is that they are a little bit bipolar, too. They have the dreams and excitement. They see the vision, but when they hit a speed bump or things don’t go quite right, it’s very hard for them to maintain that dream.

Then they get down, depressed and negative, thinking, “That didn’t work.” They make up all sorts of reasons why until they find the next dream. Have you seen that as well?

Jerry: Yes, Dreamers are not leaders in the sense of what a good leader is. Dreamers rarely have the ability to rally the troops.

There’s a scene in the movie, “Animal House.” John Belushi says, “We’re not doing to take this anymore! Let’s go!” Then he runs out of the room, hoping everybody will follow him, but no one moves. That’s a Dreamer.

Robert: They’re not really grounded in practical reality. The dream is real for them. They want to see this go better, but they have personality issues that don’t enable them to follow through and delegate well. They don’t have great persistence, so they can be very frustrating to work with.

Jerry: There was a book written called The 5 Paths to Persuasion. Bob Miller of Miller-Heiman fame is one of the co-authors and he talks about Charismatics. They’re kind of like Dreamers. Their enthusiasm can trap you and make you believe that great things can be accomplished. They usually expect that other people will work out the details.
If you encounter a Dreamer and realize a person is a Dreamer, you can try to mitigate any risk by seeing if he will agree to identify a Frustrated Driver or an SGO within the organization to be the champion for the initiative you or he is thinking of putting in. That way the Dreamer can continue to dream, but the SGO within the organization can make things happen.

Robert: You can think of them as Charismatic or Visionary in some cases.

Jerry: They need someone to handle the details and work.

Robert: Sometimes you see that in great business partnerships. Maybe it’s rare, but you see someone who is a great dreamer and someone who is a great implementer. Somehow they make it work. But if you don’t have that implementer, you’re really in trouble.

Jerry: If the Dreamer is a natural salesperson and one of the founders of a company, he may wrap other companies into the dream by selling something which you, as a consultant, have to somehow figure a way to deliver.

The visionary framing of the Dreamer is both wonderful and dangerous at the same time. Someone always has to clean up after the Dreamer.

I would suggest being very cautious about finding yourself in a situation where the Dreamer has made an enormous commitment outside of the client company, maybe involving other people, and you are the prime delivery vehicle with no SGO who can help.
Then it all falls on you. I’ve been in situations where I’ve had to clean up after Dreamers who were engaged. It was not fun.

Robert: They have this big idea that will make a huge amount of money and be really successful, but when it comes down to the brass tacks of implementing it, they’re on to the next bigger idea. They don’t want to implement the other one because they have the next bigger one.

I’ve rarely worked with product companies, but I worked with a fellow who developed a product for back care. It interested me because I’ve had this lower back problem for 20 years.

I worked with a product development guy. We put it together. It was simple and ingenious. We tried to test it out in some stores. Then he said, “I can’t really put any money into that right now. Here’s the next thing we ought to be doing.” At that point, I said, “Adios.” It just wasn’t going to work. You have to know when to leave a Dreamer.

Jerry: If there’s an SGO involved, then you have hope, but if there isn’t an SGO, then that uncomfortable feeling you have is the bag you’re holding filled with problems.

Robert: We’ve talked about five types that are quite problematic. The next three types can be much better clients, so we really want to develop an eye and distinction for who they are. We have the Terrible Troubled, the Frustrated Drivers and the Sincerely Growth-Oriented or SGO.
Let’s start with the Terrible Troubled. Who are the Terribly Troubled? Why are they a good client? Why are they motivated to produce results?

Jerry: The Terrible Troubled is usually someone whose business is in a crisis mode. They come to you truly with a sincere desire to find a way to save the baby.

I had a recent client whose investment company had bought a company in Los Angeles. It was getting slaughtered with Asian competition. It was a capital equipment company.

The two investors came to my office and described the circumstances. It was obvious that the company was in a lot of trouble.

They described the management team. It looked like at least there was something to work with in terms of the capable management team. One of the principles was a West Point grad with an MBA from UCLA. He was very smart and intense.

I knew just by sitting with them that they were not Opportunists because they were all about, “What can we do to save this business and the employees and extract whatever economic value we can?”

They were talking in good, solid, definable business terms with a broad sense of the outcomes they wanted to achieve, which included what was best for the people, the company and the investors and what was best for extracting the value they had put into the company.
Terribly Troubled, per se, is not enough. You have to say Terrible Troubled plus substantive and ethical. There are people who will come to you who are Terrible Troubled, but are really Opportunists. There are people who will come to you Terribly Troubled but are really Takers.

BMMDI usually don’t get into the Terrible-Troubled mode because they’re very passive. They try to avoid anything that looks like it might be trouble.

Robert: It’s almost like they’ve had a wakeup call. They’ve been doing well in business and have been good businesspeople. They’ve been making a profit and are interested in growth to some degree.

And yet, something happened where there is a crisis, like a drop in revenues, a drop in profitability or a change in the marketplace. They’re not just going to sit around and twiddle their thumbs. They want something to happen.

Jerry: The good thing about the Terribly Troubled is they become pretty decisive. You have no trouble getting whatever support you need to do organizational things that will help the company.

They’re very engaged in the detail. They’re the kind of person who will roll up their sleeves and get involved in a working session. They’ll take some of the tasks themselves, hold people accountable, set expectations and put measurements in place.

They’re pretty serious businessmen and women who recognize they have to take action and have to take action quickly. The length of the engagement is usually as long as it takes to turn the business around.
Robert: These last three types are people you really want to get as clients. Let’s talk a little bit about how you need to interact with them in order to get the contract. How do you have to conduct the sales process? What are they looking for from you in their conversations?

Jerry: The Frustrated Drivers, Terribly Troubled and SGO are all looking for plausibility. They have to get that concept that, “You’ve really thought of everything. That approach makes sense. I see that, if I follow the process you’re talking about, or the steps you’ll take me through logically, we can achieve the change we need to achieve.”

Add on to plausibility some case studies that demonstrate firms that were in similar situations and have achieved great things, turnarounds, improvements, lower employee turnover, higher sales per salesperson annual numbers.

Robert: They’re looking for proof, credibility, validity and plausibility. You can’t use any smoke and mirrors with these people. You really have to show, “I understand your problem. I’ve helped other people like this before. Here are some examples and the basic approach we would take that would produce the results for you.” It’s very straightforward and no nonsense.

Jerry: The truth is that you would use that approach with anybody. You would use it with the Taker, Opportunist or BMMDI. It’s just that that kind of seed doesn’t grow in the ground that Takers, BMMDI, Opportunists and Dreams live in. It’s not the quality of the seed. It’s the soil in which you plant it.
Robert: You’ll also notice, as you’re going through this process, that people are giving you the kind of responses you want. They’re asking you the right questions. They’re calling you to task in the right way, not going off on ridiculous tangents. You really feel that you’re getting somewhere.

Jerry: There becomes a resonance in what you say.

Robert: Let’s get into the Frustrated Drivers.

Jerry: The Frustrated Driver I’m thinking of inherited the business when her spouse, the CEO, died suddenly. She became the owner of this very large business.

For years, as an interested but non-participative member of this family, she recognized that there was an enormous lack of productivity, accountability and expectation.

The first time I met with her, I was absolutely amazed by the amount of enthusiasm and intensity with which she wanted to get things straight. You almost had to hold her back and say, “You don’t really need to take out everybody and shoot them!” I didn’t use those words. I’m exaggerating here for effect. But the enthusiasm and intensity was there.

One of the things about Frustrated Drivers that is different than Terrible Troubled and SGOs is that they would like things to happen too quickly. You have to provide methodical but constant, insistent progress so they don’t get too frustrated, so that they feel like you’re continually driving the business in the proper direction.
The sense of urgency in the Terribly Trouble and the Frustrated Driver is enormous. They’re both very high on the sense of urgency scale.

Robert: How would I know the difference between the two? How would I approach them slightly differently?

Jerry: The Terribly Troubled are rather cold and calculating in the business objectives. They’re emotionally tied into it because they’re troubled, but they’re really all about the business objectives.

Frustrated Drivers occasionally have a personal sense of validation they’re trying to achieve at the same time as they’re trying to achieve the business goals. So if I’m the son of the owner and the owner has finally retired, and I take over, I need to validate myself.

There’s a personal touch to the Frustrated Driver that the Terribly Troubled doesn’t necessarily have. The person was waiting for the opportunity to take over the business, or is thrilled that they have the opportunity.

Now it’s time to show that they, as this new owner, manager or vice president, can accomplish things that they knew needed to be put into place all along but never had the authority, funding or approval to do.

The Frustrated Driver requires a certain amount of acknowledgement that he’s doing the right thing with support and appreciation for milestones achieved. That helps solidify the fact that you’re not only accomplishing the business goals,
but you’re giving the individual what the individual personally needs from a psychological standpoint.

Robert: It all gets very subtle doesn’t it?

What are the kinds of things you could do wrong that would lose you getting the business from the Terribly Troubled or Frustrated Driver? They’re motivated. They want to do the business. They could be good clients. How could you blow it?

Jerry: If you fail to recognize that there are perhaps sacred cows in their organization or value system.

Let’s assume that you found a Terribly Troubled who needs to turn the business around, but there are some people in the organization who really need to be replaced or moved to other assignments. The Terribly Troubled just didn’t have the personal wherewithal to do that. He is unable to confront that situation.

Frustrated Drivers might be the same. Their frustration is internally driven. They want to drive, but there may be sacred cows that can’t be touched like relationships, channel deals or cultural things that they just don’t want to change.

For a person who is an analytical driver, like I am, it’s very possible to run over these things and not realize that you’ve run over these “sacred monuments” in the business. Later on, someone confronts you and says, “You really shouldn’t have done that.”

You need to know ahead of time whether there is anything that needs to be preserved. It’s like a strategic air strike. “Look at
this town. We have the strategic fleet to bomb this town, but there’s a holy shrine over there. We can’t touch that. It would have been nice if we had known. Now you tell us.” Or there’s a hospital, orphanage or something like that.

You need to know what those untouchables are. That is the only thing I can think of. If you’re don’t know, you can get really enthusiastic about driving to conclusions, and through ignorance, run over things you shouldn’t be running over.

Robert: What are the elements these people are looking for in a proposal?

Jerry: That’s an excellent question. They want milestones. They don’t usually have trouble in agreeing to the amount as long as there’s an economic equation that shows it’s a good, reasonable turnaround.

Robert: They’re not price buyers.

Jerry: No, they’re looking for milestones and deliverables. Let me give you an example. You could say, “Here’s the date. Here are the people who will get involved in strategy. At this point in time, we’ll have a reformulated strategy. At this point in time, we’ll prepare the new market launch plan.”

They truly want a step-by-step approach to show the specifics of how your general process will apply to their problem and their business. They usually require having a good understanding of who the team members are you will depend on and at what point they will pay you.
You might get 30% upfront, 30% after this milestone, 20% after the next milestone and 10% at the end. Whatever that breakdown is, they have it have it clear.

The key to the proposal is that it doesn’t have to be wordy, but it does have to be complete so they can see all the pieces and parts and how they work together. When they look at this proposal, you want them to say, “These folks have thought of everything. I haven’t seen anything that’s laid out as clearly. Let’s get started.”

Robert: It outlines a good plan with clear objectives, measurements for success and the basic milestones for your methodology. “We’ll do _____, _____ and ______ like this.” All of these factors apply when we’re interacting with and marketing and selling to clients.

Let’s get into the last, but not least, Holy Grail of clients. The ideal client is what you call the Sincerely Growth-Oriented. Who are these people? How do you market and sell to them? How do you recognize them?

Jerry: An SGO is a person who always has a major improvement initiative going on in the company, whether or not the company is in trouble or doing well.

Let me give you an example: Jack Welch, when he was at GE. GE has a really disciplined and refined business process. They’re kind of the machine. No matter what business you put into that machine, it will make money somehow. If they end up selling the business, they’ll sell it and make a profit. They’re a wonderful cash machine.
As sophisticated, thoroughly vetted, exercised and run out as their business, financial and manufacturing processes are, Jack Welch decided to put in Six Sigma.

**Robert:** Which is one level above what he was doing before.

**Jerry:** Could he have gotten away without doing that? Sure. He was the head of GE. He didn’t have to do that. I’m not sure if this is a true story, but I’ll tell you how I heard it.

The story goes that he brought his executives in one at a time from the major divisions and said, “We’re going to embark upon a program called Six Sigma. I want your personal support. I’m asking you for it.

“If you give us your support, I’ll be happy but if you give us lip service and six months down the road and you haven’t accomplished what we’re expecting of you or you really haven’t bought into it, we’ll just let you go with no severance.

“Or you can say now that you don’t believe in it, and we’ll give you a nice fat severance package, but we just can’t afford to have you in the way if you’re not committed to it. You have a choice. Think about it over the weekend and come back.”

Here’s a person who is sitting atop a company that is just so enormously efficient, and he decides to create an enormous amount of organizational turmoil by employing a program over as a huge and international a company as GE. That is a Sincerely Growth-Oriented Person.

**Robert:** He really laid it on the line. It’s like he said, “I’m serious about it. If you’re not with it, you’re gone.” That’s a great reality check.
Jerry: “Don’t give us lip service then not do it because the consequence will be bad for us. We can’t afford the waste of time.”

An SGO is one who is continuously looking for programs to reinforce the foundation and capabilities of the company so they can provide a strong base for continued growth.

It’s possible that an SGO might be in a Terribly Troubled company, but it’s rare. An SGO is always aware of where the problem is and always working on ways to permanently fix it. They never stop. They’re Energizer bunnies. The SGSs, they keep on going.

Robert: For most of this we’re talking about consulting engagements and clients who would be appropriate for consulting. What percentage of businesses are run by SGOs?

Jerry: I don’t really know the numbers from my own research. I do know that, if you apply this to your own business, I predict the percentage of revenue that comes from Frustrated Drivers, Terribly Troubled and SGOs will be somewhere in the 80% region. It’s almost a Perato rule.

You’ll also find that SGOs, Frustrated Drivers and Terribly Troubled are usually at the top of the organization. Opportunists, BMMDIs, Takers and Stumps tend to find a nesting place within the organization.

Another way to recognize that, when I go into a company I’ve never been in before and am serving the top 10 marketing and sales executives, I say, “As you know, we’re embarking upon this program to do _______. I’d like to talk about it, get your
perspective and get your thoughts about the implications for you and your job.”

There are two reactions people usually have. They politely listen to you and answer your questions in a rather bland way, or they say, “Boy, am I glad you’re here! I have been trying to put a program like this in place a long time. Do you have a minute?” He reaches over, bring out a three-ring binder and says, “Here’s what I’ve put together. Maybe this can help you.”

You can almost immediately tell that a person is an SGO or Frustrated Driver, just from that first engagement. Everybody who quietly listens, rolls their eyes or shows weak body language is either a Taker, an Opportunist, a BMMDI or a Stump. These people reveal themselves to you even though they’re trying not to.

The person with the bad body language, who just answers questions, doesn’t engage and doesn’t show any enthusiasm is down in the bottom four categories by definition.

Robert: They’re just going through the motions. They’re being their particular type at that moment, which is not really about producing great results.

Jerry: I just thought of something that might give you an answer to the question of percentages. If I give a lecture on some of these growth concepts to 50 people or a dozen people, generally only about 10% will comment or engage with some enthusiasm.

That is a really anecdotal way to tell you the percentage. Almost consistently, one or two out of 10 or maybe five out of 50 will engage and get excited about it.
Let me give you an example. You said you thought you might be an Opportunistic? Robert, you’re a Sincerely Growth-Oriented.

Robert: There are always little parts of the other things and I’ve seem myself in those, but definitely I am Sincerely Growth-Oriented.

Jerry: Fifty people were at the Institute of Management Consultants Confab when I gave this talk. About five people came up to me afterward and were really interested and intrigued enough by it to ask extra questions.

My guess is that 10% is accurate, but the productivity of those 10%, not only for their own benefit but for the benefit of the company and engagement, enormously outweighs their small numbers.

Robert: I want to really advise people that, if you’re looking for these right clients, you need to have a place in your marketing materials that says, “These are the kinds of clients I’m looking for.” Often we miss that entirely.

I advise that you have a page on your website called “Who We Work With” or “Who We Succeed With” that says, “These clients have these issues and concerns. These are the ideal kinds of clients for us.” Then you basically describe Terribly Troubled, Frustrated Drivers and Sincerely Growth-Oriented people so they read that think, “Yes, that’s me. They understand me!”

I’ve found, in my business, I tend to get the kind of clients I like because I put a lot of focus on describing who they are. Guess what? They’re the ones who emerge out of the woodwork.
Jerry: That’s a very good point. I wouldn’t necessarily ask a self-assessment questionnaire, “If you meet these points, you’re a Stump.” You would have to put code words in there like “working with Robert is not for the weak-hearted.”

Robert: This is would be things like, “People are most likely to succeed with us if they want to get solid, long-term results and turn around their marketing permanently to attract clients consistently.”

You just think, “If I were going to describe some characteristics of my ideal clients, they are people who are motivated and willing to make a difference. Their values include high integrity and ____.” Talk somewhat about the values of the clients that you want.

That will often eliminate the Stumps, Takers, Boss Made Me Do It and Dreamers right away. Those people will be attracted to your business as well. You can put out the sign, so to speak, and always be talking about that.

Jerry: I want to make a capstone comment. The one common thing to ask yourself when you meet a prospective client is, “Will this person have the wherewithal to affect, drive, encourage and reward change in the organization?”

We’re all dealing with change, personal or organizational. Change is a painful experience. When you look at these types like the Terribly Troubled, Frustrated Drivers and Sincerely Growth-Oriented, these are people who, by their nature, are not afraid to confront change and deal with all the challenges associated with change.
Robert: We’ve covered a huge amount on this interview, Jerry. It was really fascinating. Making these distinctions about these different types really can do a lot for your business.

It can be a wakeup call to everyone listening to this recording to be aware of all those categories of potential clients who just won’t be very good clients for you and to learn how to let go of them quickly, not to chase them for too long and not to hold too many hopes for them.

Then you can start putting the marketing, networking and selling energy into finding the Terribly Troubled, Frustrated Drivers and Sincerely Growth-Oriented.

It’s like the Law of Attraction, which is very popular these days. If you’re very clear about whom you’re looking for, you will attract more of those people. It will come through in your materials, how you speak and just your attitude.

As they say, like attracts like. If you yourself are oriented around being a Sincerely Growth-Oriented person who really makes a difference, and it’s clear that’s where you are as well, Jerry, you will attract more of those people.

Jerry: There’s a synergy that happens when you’re talking about growth to Frustrated Drivers, Terribly Troubled and SGO. They get to feel that you are as committed to their success as they are. It’s as important for you to see their success as they believe it is.

When you look at the statistics of dealing with those kinds of people, the length of the engagement can be as much as ten times longer.
The magnitude of the projects from an economic benefit to you can be almost thirty to one larger in terms of big projects. You can get huge projects when you get to those people.

If you look at annual client activity values between Opportunists and the Sincerely Growth-Oriented, you can earn as much as six times more money from an SGO engagement than you can from an Opportunist engagement. The numbers are rather staggering.

If you ever want to take your own business and put it through this assessment, I’d be interested in hearing if you come up with similar numbers. I think you would find, while the numbers might not be exactly the same, you would see the ratio effectiveness of using such a model.

Robert: That’s very true. Thank you so much, Jerry, for your willingness to be involved with this. I know my clients and subscribers will get a huge amount of value from this. It will be a great wakeup call for many people and will enable them to be more effective marketers, which is what my business is all about. Thank you very much.

Jerry: Thank you, Robert. It’s a pleasure.