

THE INDEPENDENT

**Avoid Disaster: 3 Actions You Can Take to Make Any Engagement Run Smoother** *by Michael W. McLaughlin*

Most consultants have to face it at some point: telling a client that the project will take longer or cost more than planned, or that there is some other obstacle to achieving the expected results. Clients want to hear that news about as much as they do a nonstop pledge drive for public radio.

No one likes to deliver (or hear) bad news about a project. And such revelations are not exactly relationship-builders. For starters, your client sponsors have to own up to colleagues and others that your best-laid plans have gone

awry. At the very least, this leads to questions about their judgment; at worst, it could be a career limiter.

But the bad news also damages your credibility. One consultant who had to backtrack on a project schedule found himself in an argument about every subsequent estimate he made for the project. In the heat of those moments, he got stuck in the middle of finger-pointing campaigns as people looked for someone to blame. In the meantime, the

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**Networking Made Easy: Step-by-Step Advice for How to Win Clients and Referral Sources** *by C.J. Hayden*

Meeting new people, in person, is consistently rated as one of the most effective ways to find new prospects for selling your professional services. Yet, after ending up with a stack of business cards from a networking event - which is good news - we often feel overwhelmed and perhaps even afraid. What do we do with them all?

**Remember Why You Are Networking**

The whole point of meeting new people is to give you a starting point for developing a relationship. New contacts almost never

become clients as the result of a one-time meeting. It's not the meeting that does the trick; it's the follow-up. So the true purpose of attending networking events is actually not to meet people. It's to give you introductions to people to then follow up with.

Timely and consistent follow-up is an essential factor for successful sales and marketing. In addition to following up with prospective clients, you should also be following up with potential referral sources.

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# Avoid Disaster: 3 Actions You Can

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project lost momentum as the team dealt with the distractions that inevitably crop up when things don't go according to plan.

## Disasters Waiting to Happen

Without a doubt, some problems come out of left field to subvert carefully designed plans. It's common, for instance, for clients to make changes to the project team, or even the project sponsor, at the last minute. Such changes can wreak havoc with your plan, and are almost impossible to foresee. For many projects, though, the seeds of trouble are sown long before a project kicks off. In fact, it's possible to trace many future problems to decisions you and the client make during the sales process.

Of all the factors that contribute to project snafus, assumptions top the list. Think of assumptions as disasters waiting to happen. And the more assumptions you make about a project, the greater the likelihood that one of those disasters will hit.

Let's say, for example, that you assume you will have access to client executives when you need it to complete specific tasks. Or, maybe you make assumptions about how quickly the client will make decisions that impact project progress. Of course, you work through these assumptions with the client and make it clear how they affect the schedule and the overall plan.

Typically, clients will give the nod to such assumptions and you press ahead. Everyone feels good because they think they have covered all the bases. But if any assumption doesn't pan out, a problem looms. And it doesn't matter who made the assumption or why. You and the client must still dig yourselves out of a hole.

Obviously, the easiest way to mitigate this risk is to assume as little as possible. But you can't remove all assumptions, so focus on those that have the highest potential for impact on critical path activities. So, if you do make assumptions about the availability of executives for key meetings, nail down that access before you start the project. Look at all your critical path activities and determine if assumptions will govern their successful completion. If so, resolve them early. If you don't, a project delay is most likely in your future.

## You Want It When

More often than not, clients want fast results. Who can blame them? Once clients agree to hire you, they want to move the effort along as quickly as possible. In response, you may be tempted to shave the allotted time off specific tasks in an effort to shorten the overall project schedule. The inevitable result of chipping away at your plan is that the

project approach is no longer adequate to meet the objective.

Don't fall into the trap of shortening your schedule unless you can see a commensurate reduction in what the client expects you to deliver. When clients push on the pace of the schedule, stick to your guns unless they are willing to change the work you are to do. Your client relationships will benefit when you are able to deliver what you promised.

That's not to say that you shouldn't plan an aggressive schedule, because you should. But be careful that you truly understand the implications of changes to your schedule before you agree.

## An Ounce of Prevention

Bad news about projects is due to more factors than I have space to write about in this short article. But in my experience, making too many assumptions and an overly aggressive schedule are the top culprits. Whatever the causes, you can take three actions early in your planning process to make any project path smoother and more productive.

- 1. Ensure that your project logic is firmly rooted in reality, not wishful thinking.** Examine your proposed approach. Ask yourself if you see precisely how your proposed work plan will lead to the value you've promised. It is easy to miss one or two small steps that are essential to achieving the client outcome. And once you miss an essential task - or underestimate its duration - trouble will follow. Validate the details of your approach with your client, and really go through those details. This one small step, taken early in your planning process, can spare you from enormous stress as the project progresses.
- 2. Express your estimated project completion date in a range, instead of using a fixed date.** For an eight-week project, for example, prepare an initial schedule that covers eight to ten weeks. Once the project is underway, you should firm up your completion date. After all, no matter how good you are at estimating the time it will take to complete each task, there are always unknowns. By keeping a flexible end date, at least for a short time, you'll be able to size up the actual project environment and nail down a workable schedule.
- 3. Plan for a few early project milestones as a way to see how your schedule and budget are holding up.** You'll never know how good your plan is until people begin to execute against it. So, test the team early to shake the kinks out of your plan.

## When a Problem Arises

Every project has its up and downs, and some problems are unavoidable. When you hit that inevitable bump in the road, it's a test of your leadership. No matter how unpleasant it may be, confront the issue with the client

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# Networking Made Easy

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A good referral source can be anyone who interacts with your desired clients on a regular basis. For example, as a business coach who works with many start-ups, I look for referrals from accountants, attorneys, bankers, career counselors, graphic designers, and people who teach entrepreneurship. If you can clearly identify your target market, you should also be able to identify who might be a useful referral source.

## The Mechanics of Follow-Up

Professionals sometimes find follow-up to be one of the most challenging aspects of marketing and sales. Just thinking about following up with prospects can provoke fear, self-doubt, and overwhelming feelings. One key to overcoming these obstacles is to treat follow-up as a routine, methodical activity. If you know exactly what you plan to do, how, and when, it can relieve some of your resistance and uncertainty.

Once you've determined which of your collected business cards belong to potential clients and referral sources, your next step is to choose how to best follow up with each one. It's helpful to sort them into categories. For example: Which ones will you call?; Which ones will you mail or email?; and Which ones would you like to meet with in person?

Here are some guidelines for each kind of approach:

**With prospective clients**, you will most likely want to phone them to gauge their interest in what you do, and try to set up a meeting. That meeting might be in-person or by phone, depending on the nature of your business. You could also mail them a marketing letter, or a brochure with a personal note. Alternatively, you could send an email, referring them to your website for more information.

The most effective way to follow up with prospects is usually to combine all three approaches in a call-mail-call sequence. Call first to gauge and develop their interest. If you can't reach them or get their agreement to set up a meeting on the first try, send them something by mail or email. Then call again to see if they are ready to take the next step.

**With potential referral sources**, the best approach is usually to establish a reciprocal relationship. You can call them to begin getting acquainted, exchange further information by mail or email, and if it seems useful, arrange to meet in person to find out more about each other's work.

It is completely appropriate to call another businessperson you have met and say, "I think we might be serving the same type of customers; could we get to know each other better

so maybe we could exchange referrals?" Another easy and friendly way to follow up with people in this category is to send a handwritten "nice to meet you" note with only your card enclosed.

Be careful when making contact by email. Many people are offended by email messages that are essentially generic marketing letters. It's more advisable to use email as a tool to communicate with people you have already opened a dialogue with. If you choose to email someone who isn't expecting to hear from you, be sure to personalize what you write.

## Making Your Follow-Up Systematic

For each category of prospect or referral source, you'll find it helpful to devise a consistent sequence to follow. For example, with hot prospects, your sequence might be: 1) call-mail-call to set up a meeting, 2) meet to discuss hiring you, 3) send a proposal, 4) call to discuss the proposal.

When prospects don't respond or don't wish to meet, your alternative sequence might be: 1) call-mail-call to set up a meeting, 2) wait 30 days and call-mail-call again, 3) send a keep-in-touch communication (see below), 4) wait 30 days and call-mail-call again.

To manage your follow-up activities, you will need a contact management system where you keep track of all your interactions. Some professionals find it easiest to use software they already know to track their contacts, by keeping them in an Excel spreadsheet or your PDA's address book, for example.

But the larger your list becomes, the more you will benefit by using a system specifically designed for contact management. These include desktop software like Outlook or ACT, web-based systems such as FreeCRM, or systems designed for salespeople like GoldMine or Salesforce. Systems like these allow you to track much more than just contact information.

Whatever system you choose to manage your follow-up activities, the important thing is to stay organized. Always have one central place where you record who you meet, what their interest is in you (or your interest in them), what type of contact you have had so far, and when it will be time to follow up with them next.

## Keeping in Touch Over Time

After your initial contact, you'll need to find ways to keep in touch on a regular basis. This is just as important with referral sources as with potential clients. Call to see how your contacts are doing, or to tell them what's new with you. Send a note with a relevant article, or email a link to

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# Finding Student Help Made Easier - ConsultantTree.com

## Students Can Be Consultants Too!

by Kevin Fessenden, ICCA member

In talking to ICCA members in the years that I have been with ICCA I have heard lots of horror stories about recruiting good help for projects. Some of you are happy with using students, while others tend to shy away from it citing reasons that the work is too complex or mission-critical to dare allow student hands to touch it. I respect everyone's opinion but I'm happy to see that many of you are giving students a fighting chance at gaining real world experience. In the meantime, you are getting some great additions to your team as well. As someone who got his start in consulting as a student, I of course lean in favor of giving them a chance as many are quite bright and have a lot to offer - even to some of you older, more seasoned consultants. ;-)

For those of you who are in fact using students I hear lots of frustrations on the best way to find the "good ones." Often we start with the local university - maybe you have a contact or two there - and see if there are any bright students looking for work. Sometimes you find students that are highly motivated and intelligent this way, more than often you do not.

So what if the student you get on your doorstep does not quite match the description the professor gave you over the phone? Or even worse - they do send over the "perfect" student. This is wonderful until you find out that this guy is only going to be available for two weeks in between the end of school and when he goes to visit his grandmother in Spain for two months. Needless to say this can be frustrating. I have experienced these same horrors in my own search for good help.

On the other side of the coin, I know what it is like to be a student looking to break into consulting. In order to succeed you need experience, but you cannot get experience until you succeed. Meanwhile door after door shuts in your face as you beg and plead for someone to throw you a simple CRUD application or a splash screen for a website. You might even be desperate enough for a "Hello World" program. Yet nothing comes.

I spent so much time and money trying to advertise like I was one of the "big guys." It was not until later that I realized I should have been advertising exactly what made me different. There were lots of companies out there that did not want the bigger, more expensive firms - they wanted student help. They just had no way to find me.

It was because of all this that I decided to start ConsultantTree.com. The basic purpose of the site is to connect students who perform computer contract (1099) work with companies looking for student help.

Through ConsultantTree.com companies can search for students based on location, skills, and availability. They can then view the resumes and pictures (if posted) of the students that match their criteria. Once they have selected a student of interest they can communicate, schedule interviews, or hire that person all through the site. Once hired, the site manages all time tracking, billing, and invoicing so the company does not need to do so. No more worrying about when this student will be available - their profile page explicitly states when they are free for projects in both dates and hours per week. No worries about



As a college student, I always had the dream and the vision but I had no clue on the execution for starting up an IT business. I researched and found lots of books and websites on entrepreneurship, but nothing focused on my particular business and definitely nothing focused on students.

After joining the ICCA, I was put in touch with hundreds of professional consultants who walked me through the entire process and the Student Program catered to my specific needs. I've been in business six years now and I owe so much of that success to the ICCA.





# Students Can Be Consultants Too

## Finding Student Help Made Easier

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surprises with students - you can read reviews from past companies on their experiences with that student.

From the student side, this is a great opportunity to gain some real world experience and get their name out to potential clients. I know this is a great opportunity for students and my partner and I have been using recruiting channels all over the country to get the word out about ConsultantTree.com.

So far the response from students has been overwhelming. We currently have over 500 student members with the site growing every day. Students are clearly excited about this opportunity and I am completely blown away by the talent that is represented. Some of these students already have seasoned consulting companies with a strong list of clients. I am humbled by their ambition and determination to overcome obstacles. I hope that the site can make the journey for them a little easier.

I have tried to find something similar out there and I cannot. As far as I can see, our site is the only nationwide database of information technology students available. This is a very powerful resource for our industry and I am pleased I could be a part of it. Believe me, if something like this already existed I would have used it!

Finally, it is important for me to mention that we have gone to great lengths to ensure the students on the site are valid. First of all, the site is only promoted through university channels to diminish exposure to folks who are not actually students. Next, we do a rigorous screening of resumes to eliminate any students who have no technical expertise or background. Lastly, if any students seem suspicious we conduct phone interviews to validate what they are saying about themselves. It is crucial to me that companies have faith in the quality of the talent listed on the site. Unfortunately we do get students who lie about qualifications or falsify their skills. This can be made easier through an online medium. The last thing I would want would be to fix one problem and create another. That is why we have gone to such measures to improve the integrity of our site.

Right now ConsultantTree.com is only being made available to ICCA members as a benefit for your membership. This will hopefully give you a greater chance of finding a student who meets your needs. With our large database, I am confident there is a talented student in your area. I encourage you to check the site out for yourself and see. For student members of the ICCA, I encourage you to register and create a profile page - it never hurts to advertise your services and the site is completely free. If anyone has any questions, feel free to contact me at [kfessenden@unitedware.com](mailto:kfessenden@unitedware.com). 



## From the Founder

by Steven A. Epner, Founder of the ICCA

### Does Optimism Pay? Does Chaos spells Opportunity?

Is it light at the end of the tunnel or a train coming at us?

This has been a bad recession. For many in our line of work, it has been closer to a depression. Competition from overseas has been intense. It is hard to compete with \$25 per hour when you need at least \$150 to live.

Some of our compatriots have dropped out of consulting. Others are running out of savings. Some have taken on a W-2 position. Others are scratching their head trying to figure out what to do. A few have taken advantage of the situation and are making money.

WHAT? Making money in this economic environment? It is chaos out there.

Chaos? Some see it as a threat, others see opportunity. I think opportunity is a much better view. Take advantage of disruptions to find new options and opportunities.

When companies lay off outside contractors to hold onto their own people, it is a warning sign. It sends a message, "you are more secure if you work for me full time." But is it true?

Most entrepreneurs have some difficulty being part of a large organization. It is not good or bad, just a fact. I was one of those people. I needed to be able to create my own work environment if I was going to succeed. The fact that I did not do well in large, bureaucratic operations helped me find a niche. I was able to go in an operation and make things happen much faster than normal because I did not have to be part of the bureaucracy.

Where can you find opportunity? After Katrina, there was a great deal of demand for disaster recovery, for setting up temporary operations, for repairing infrastructure. The economy is just a different type of hurricane. Find the pain and help alleviate it.

For example, once an organization cuts back on the number of people doing the work, they always find they have too much to do. Most consultants have given up

calling them. That represents opportunity. If you are the first one to call after they find the basic needs have not gone away with the economy, you could be the first one in. It takes perseverance. You have to keep trying. You have to stay in touch. You have to stay active and involved. You can't afford to be a slacker.

The big thing now is to find ways to make more money. If you are a BI expert, can you help create information to segment markets, products, customers, and employees to help your client get the most bangs for the buck?

What if you really understand inventory? Can you help set up systems to reduce the amount of product on the shelf? Jon Schreiberfedder did just that. He is now so busy, he does not know which way to turn.

Cyber security is another field that is booming. The guys who bought my company have found the Risk Management part of the practice to be growing faster than any other. In the last two years, the group has more than doubled. Everyone wants help.

Then there is the integration of handheld devices into legacy systems. Sales people want to have access to inventory data and be able to commit to a customer while in the office. They want to connect with an iPhone or a Blackberry and get an answer now. Someone has to create all of the code, train the field staff and manage the rollout.

So stop focusing on the negatives and look for the positives. Sure things are down in some markets. But, I can bet you some enterprising young business person will find a way to even make money in the automobile industry. Finding opportunity in technology will be much easier.

So how do you see it?...

### Does Optimism Pay?

### Does Chaos Spell Opportunity?

# When Marketing Budgets Are Tight, Take Time to Improve Your Conversion Rates

by Todd Miechiels

Every so often something happens in our lives that leads us (or sometimes forces) us to address something we've likely neglected either consciously or subconsciously. When things are going well we give little thought to certain areas but when they go poorly we will give it our full attention.

For instance, when I'm feeling (and am) more overweight than normal, I'm going to pay closer attention (and probably make wiser decisions) to what I eat or if I'm getting up in the morning to exercise than I would when I'm feeling fit and trim.

If I'm getting a sky-high heating bill in January, I can't help but to notice, and will hopefully take care of the two, or three (or 15) windows that leak like my downstairs faucet (that's another problem altogether!)

If losing weight, or lowering my heating costs is important to me, I know I've got something that I can do to address it. And in both of these cases I may not see huge returns on my time and money immediately, but wisdom tells me that over time the benefits and return are enormous and will continue to add up.

Today I want to share with you what may seem obvious to some of you, but the more I talk to people, I can't help but spread this simple message. **When marketing budgets are tight, and you are under pressure to do more with less, look to improve your internet marketing conversion rates.**

Specific in the online world that might mean you get:

- ♦ 10 leads from every 1,000 visitors instead of 5
- ♦ 20% to sit through your product demo instead of 10%
- ♦ 5% of people who come to your site to donate money, instead of 2.5%

## Why Should You Care?

It's easy to believe (no still less shocking) that if you raise your conversion rate from 1% to 2%, that's a 100% increase in sales! That increase comes *without having to pay a dime* in additional sales and marketing costs associated with getting more people to your site. Plus, that's a 100% increase in sales month after month after month.

Most of us don't sell products online but it's just as powerful in a B2B lead generation type scenario. Check this out: Your company spends \$5,000 in sales and marketing costs to help get 5,000 targeted people to your

website each month. Of those 5,000 people, your website cranks out 50 sales-worthy leads at a cost of \$100 per lead, or a *conversion rate from visitors to leads of 1%*.

If the website is able to convert 2% of visitors to leads instead of 1% that's a...you guessed it, a 100% increase in sales leads. Not to mention you've cut your cost per lead in half. Project this type of scenario out with your own numbers over a year or two and it should be enlightening.

## POP QUIZ:

To double your sales/leads this year, which is less expensive:

- ♦ creating twice as many targeted visitors to your website each month for 12 months, or;
- ♦ increasing your conversion rate by 100% one time

*Hint: I didn't ask which is easier, but which is less expensive.*

## The Problem/Opportunity is Right Before Our Very Eyes

It's absolutely and consistently shocking how many companies and their agencies continue to spend more money on advertising and marketing without making an active effort to measure and improve their conversion rates. Maybe it's because conversion rate isn't as obvious as a wide-open window in the winter, or a bulging belly over the belt line. But the more you spend, the more important this should be.

And here's one last truth, if you are going to be spending to create twice as much traffic this year anyway, *and* you were to increase your conversion rate from 1% to 2%, that's a 400% increase in sales.

## What You Can Do Today

- ♦ Demand through monthly reports your website's conversion rate.
- ♦ Segment, segment, segment. For example, what is the difference between conversion rates for search visitors who enter on your "brand" keyword against search visits from more generic keywords?
- ♦ Start an initiative to systematically improve your conversion rate.
- ♦ Challenge every dollar that's spent on marketing that could be allocated towards improving the conversion rate. □

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# Taming the Vigilante Consumer - What Do They Really Want?

by Patricia Fripp, CSP, CPAE

Today's consumers can sometimes look like a threatening mob. They're often unhappy, make vague or irrational demands, and can rush in unexpected directions that strongly affect our livelihoods. They may suddenly take their business elsewhere or bombard us with time-consuming, expensive complaints. Even both.

"These people are manipulating the marketplace through pressure, protest, and politics," says futurist Faith Popcorn who coined the term "vigilante consumers."

Why have our customers become so volatile and unpredictable? The answer is simple. In the old days, conventional marketing divided prospective consumers into two categories, the classes and the masses. If you're selling \$100,000 cars you appeal to the classes, and if you're selling Hyundai's, you appeal to the masses.

Then along came retailers like Walmart who combined good buys with good customer service. "Now the masses know class," says Popcorn. But these vigilante consumers are rarely as dangerous as they sound. Their wants are simple: just value, service, convenience, choice, and lots of attention.

Impossible, you say? Quite the contrary. This is a great time to be alive and in business. Armed with facts, drive, and an open mind, we can begin planning strategies that will bring us challenge, fun - and profit.

## 1. Find out what your customers really want.

In a shuttle bus taking me to the airport after a speaking engagement, I began schmoozing with the driver. (I'm always looking for new material.) Knowing his service was not affiliated with any of the resorts, I asked if the guests he drove told him about their experiences at the various hotels. "Yes," he said. "In fact, the general manager of the property where you were staying brings a big box of donuts and has coffee with our drivers once a month. We not only tell him everything we hear about his property, we tell him everything we hear about his competitors."

How many businesses have spent a fortune with research firms to find out what this resourceful general manager gets for a box of donuts and an hour's conversation every month!

The most frequently overlooked low-tech customer survey method is to talk to someone who talks to your customers and has no vested interest in their opinions. But this doesn't mean you don't also interview them formally.

The Ritz-Carlton Hotels, famous for customer service, conduct regular formal surveys with cards in the rooms and mailings. When I was speaking on the same program with their former president, Horst Schulze, an audience member asked, "Why don't you offer a 'frequent guest' program?" (Such programs are a major investment of organizational time and philosophical strategy.) Schulze replied, "We don't because only two percent of our customers have asked for them. What our customers do want is to have a bowl of fresh fruit in their room when they check in." When you know what your customers really want, it is rarely difficult or expensive to make them feel special. Schulze was doing exactly right.

My friend David Garfinkel, a copy writing genius, says there are five important answers you need to get from your customers, directly or indirectly.

- ♦ What do you like about buying from us?
- ♦ Why did you buy from us in the first place?
- ♦ What problems did you have before you bought from us?
- ♦ How did we help you solve those problems?
- ♦ How are things better for you now?

"That last answer," he says, "is very important. It's what a positive result looks like to a real customer, and it's going to look the same to your other customers and prospects when you tell them about it."

## 2. Make your customers feel special and appreciated.

Great customer service is no longer good enough. We have to exceed the vigilante consumers' expectations. One individual who knew this before anyone else is Gary Richter. He runs a small boutique bank in Naples, Florida. At 5:20 one Friday afternoon, the bank received a call from an elderly woman who needed to cash a \$200 check. The bank closed at 5:30, and she was 20 minutes away. Many of us would say, "Of course, please come over, we'll stay open for you." But Gary's bank believes in giving exceptional service. One of their employees delivered her \$200 on his way home and picked up her endorsed check.

It turned out that the woman had her extensive financial holdings at a large national bank. After this positive experience with Gary's bank, she moved all her assets and investments to his bank.

Gary's bank continues to focus on superior customer service. "I tell my employees, if we roll out the red carpet

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# How to Immunize Yourself Against Tough Economic Times

by Jill Konrath

**S**elling in today's economy is tough. And, it's likely going to get a lot tougher in the upcoming months. That's not news that we want to hear, but it is the reality we face so it makes sense to address it head on.

Recently I noticed that 465 fewer sellers get my newsletter today than 3 months ago, even though I've added tons of new subscribers. Why? Dead email addresses. I can only surmise that these sellers have lost their jobs. Ouch!

## So let me ask this: What are you doing about it?

I can tell you right now that I'm taking action. Tough times call for different sales approaches, new offerings and stronger business cases. It's not enough to just make more calls or have more meetings. We have to be better than we've ever been - in every aspect.

**But let's talk about you right now.** Are you hoping you can hang in there for a while longer? Hoping that you'll still have customers? Hoping that you'll make your numbers?

As Rick Page says, "Hope is not a strategy." As far as I'm concerned, there's only ONE thing that makes sense right now. It's time to take charge of your own career.

**You can't count on your employer to take care of you.** That's a brutal statement, but true.

Whether you work for a big organization or an upstart firm, you could lose your job tomorrow. Even if your boss really cares about you! Even if your company is still doing okay. Of course, you realize that it's not personal. It's just a business decision.

**But it is personal.** It's your life, your career, and your family that's at risk. I don't mean to be an alarmist. I just want you to wake up and take responsibility for your future now so you can minimize the effects of this economic downturn.

Too many sellers I know are complacent, coasting, doing what's expected of them but not a whole lot more. If this continues, it will be their downfall.

**When companies hit tough times, mediocre sellers are the first to go.** Doing an "okay" job or being "average" is no longer an acceptable contribution.

If you're mediocre, you're also disposable to your customers. Being knowledgeable about your product or service is no longer enough. All that information is online, so you don't bring value. When that happens, they replace

you with a lower cost solution.

Customers want to work with experts who understand their business and can help them achieve their objectives. To do that well, you need to be a problem solving, critical thinking person who can synthesize lots of information and turn it into invaluable, actionable ideas.

In tough times, you have to sharpen your sales skills and bring expertise to your customers. Doing just one is not sufficient. Whew! That's asking a lot.

**You just have to keep getting smarter and better in order to stay in the game.** If that's not your focus, you're vulnerable to the ravages of these tough times.

Don't let it happen to you. Give yourself a booster shot! It's time to invest in your own professional development program. Don't wait for your company to send you to training programs to upgrade your knowledge and skills. You're not #1 on their priority list.

But you are #1 on your own priority list. So, wake up. Get going. Your livelihood depends on it.

## Booster Shot 1: Open Your Mind to New Thinking

When was the last time you read a book that offered fresh perspectives on how you can be a valuable resource and/or a top seller? Honestly? What are you waiting for?

Here are several books I've found stimulating:

- ♦ *A Whole New Mind*, Daniel Pink: Discover the skills needed in a changing economy.
- ♦ *Good in a Room*, Stephanie Power: Fresh observations and useful advice.
- ♦ *Presentation Zen*, Garr Reynolds: Learn how to tantalize with your presentations.
- ♦ *Made to Stick*, Chip & Dan Heath: What makes (sales) stories memorable.
- ♦ *Back of the Napkin*, Dan Roam: Discover strategies to really engage your prospects.
- ♦ *Metaphorically Selling*, Anne Miller: New ways to make what you say, pay.

And I would be remiss if I didn't mention my book *Selling to Big Companies*. It challenges your entire process for getting into corporate accounts and shows you what's required. If you haven't read it yet, you're missing out.

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## How to Immunize Yourself

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Blogs are also a great place to get fresh perspectives. I regularly read blogs about sales, marketing, business development, creativity, writing and more.

### Booster Shot 2: Increase Your Personal Productivity

Virtually every seller I know could get much more done in less time if they leveraged technology better. Not only that, but you'd be a whole lot savvier when you're with your customers - which should directly correlate to increased sales success.

There's no excuse any more for not using these resources. In fact, if you don't know about them or can't use them, it's time to get educated. Here's what I recommend for:

- ♦ Finding contacts: Jigsaw, Netprospex, LinkedIn
- ♦ Triggering event updates: InsideView, Google & BizJournals Alerts
- ♦ Account research: Hoovers, D&B, ZoomInfo
- ♦ Industry intelligence: First Research
- ♦ Email intelligence: Genius
- ♦ Sales productivity: Landslide
- ♦ Online Meetings: GoToMeeting, Webex

All these resources are affordable to everyone. If your company doesn't pay for these services, use your own money. The value that you get from them far outweighs the expense. You'll save so much time, plus learn critical insights that can be leveraged for business success.

### Booster Shot 3: Get Connected - and Stay Connected

The worst time to build your personal network is when you're desperate. No matter how hard you try to sound normal, every contact oozes with your neediness.

Start by creating or updating your LinkedIn profile. From a business perspective, it's the place to be. If you're not sure what to do, check out my profile at [www.linkedin.com/in/sellingtobigcompanies](http://www.linkedin.com/in/sellingtobigcompanies). Once yours is ready for prime time, you can:

- ♦ Ask your boss, co-workers and clients to recommend you. Do it now, not when you need it.
- ♦ Invite your customers to connect with you online. That way, if anyone changes jobs, you can keep in touch.
- ♦ Look up former colleagues (classmates, friends, etc.) and invite them to connect.

Get out from your self-imposed isolation too! I know you're busy. But it's important to talk or meet with people from outside your own company. Arrange breakfast meetings.

Attend industry events. Take a former colleague to lunch. My favorite? Meet for coffee over the phone! It saves so much time, but it gives you a dedicated time to talk.

Finally, remember that networking is not a one-way street. You'll find people much more willing to help you out if you're a GIVER first. You can share insights, refer potential customers, make connections, or offer genuine assistance in any area. As a bonus, giving makes you feel good inside too!

### In Conclusion

While these booster shots can't protect you against everything, they will give you the best immunity possible for these tough times. Plus, when you make them a part of your life, your success is truly guaranteed - in tough times and in good times!

Everything is within your control. That's why it should be your focus right now. Because it is what you can do. Because it will make you a better seller. Because it changes your life & your career. □

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## MEET AN ICCA MEMBER

### **A New Way to Connect with Local Businesses Needing Your Tech and Computer Services...**

Launched in April 2009, TechShortcut.com is a new website dedicated to business technology for small-and medium-sized businesses. TechShortcut's mission is to give businesses a vibrant and independent meeting place to learn and connect with local technology consultants to improve their businesses.

Prior to founding TechShortcut.com, Jeff did software support, development and consulting work over the past 20 years. He has worked for Bechtel Corporation, Jacobs Engineering, PeopleSoft and RobertHalf as an estimator, cost/schedule engineer, software support specialist, software developer, development manager and technical consultant.

While Jeff is passionate about technology, he is a realist about tech adoption. "Technology is simply a tool," he said. "Like any other tool, you must always understand the business need and then evaluate the cost and benefit of each option."

Eventually, Jeff began focusing on helping smaller, tech-challenged businesses rather than the Fortune 500 companies he primarily worked with at PeopleSoft.

In 2005, he started his transition toward this new focus by spending two years consulting part-time with the Small Business Administration's (SBA) Technology Advisory Program (TAP) in San Jose, California. TAP provides free advising and low-cost technology courses for small business owners.

At TAP, Jeff worked with other tech consultants to advise small business owners on the use of technology to improve their businesses. Advising services included website audits, software solution evaluations and full IT audits that would evaluate technology use in all areas of a business. "Working with small businesses showed me that there are serious inefficiencies in the small business technology market," Jeff said. Jeff has seen the following problems firsthand:

- 1. Lack of Information** - With so many solutions and so much emphasis on the "latest and greatest" products and services, it is nearly impossible for businesses to find information to help determine what product or service is best for them. It is great to have so many choices, but it is overwhelming for businesses.
- 2. Lack of Tech Help** - Most small businesses lack dedicated tech help and have trouble finding the right local tech help. The "Holy Grail" for most businesses is to find local tech

service businesses that can be part of their extended team. Having a local partner is the ideal rather than trying to work with someone out-of-state or out-of-country.

On the flipside, tech consultants and tech service providers have a hard time increasing their visibility to local businesses. The Yellow Pages don't always work well for technology businesses because it can be difficult to convey what the tech business does in a few lines of text, which can lead to a flood of calls from the wrong type of customers. Referrals from others can work out well but they are not always a reliable source.

Jeff knew that he wanted to do something to help. He thought about writing a book and chose backups for the first chapter. He found that few, if any, business owners were going to read 5 pages about backups, no matter how good, and a book wouldn't address the need to find local tech help. TechShortcut was created to address these problems by providing the following:

- ◆ **Solution Overviews** - Condensed overviews on technology solutions with an emphasis on the key high level benefits, features and options so that businesses can understand and communicate their need to technology consultants.

- ◆ **Local Tech Business Directory** - A directory of local tech and computer consultants and service provider firms within the U.S. that can do the tech work and become part of a businesses' extended team. The directory, which is currently being assembled, includes businesses that provide services related to websites, business software applications and IT infrastructure.

- ◆ **Other Tech Resources** - IT management guides, a research helper and links to other helpful sources of technology information on the Internet.

Jeff came across the ICCA while doing research for TechShortcut. "It was exciting to find an organization that stood for the same principle of independence I want to adhere to in TechShortcut," he said. "Let the best solution win!" Jeff is proud to have TechShortcut as a member of the ICCA.

### **Free Advertising for Tech Consultants and Service Providers...**

Jeff invites ICCA members to sign up and assist small-and medium-sized businesses by being part of the TechShortcut team. TechShortcut.com provides free business profiles for members that provide services related to websites, business software applications and IT infrastructure. Visit [www.TechShortcut.com](http://www.TechShortcut.com) to sign up. □



Jeff Keihl  
[TechShortcut.com](http://TechShortcut.com)



# Becoming an Agenda Setter and Other Keys to Building Trusted Partnerships with Your Clients

by Andrew Sobel

Some firms call them “office of the chairman” accounts, while others simply refer to them as key clients. These are the flagship client relationships that propel your growth in good times and provide essential ballast in a downturn. They are broad and deep, transcending any one individual professional or service offering. Usually, they endure for years.

These trusted partnerships account for a disproportionate share of most firms’ revenues, profits, and intellectual capital. An archetypical example is Booz Allen Hamilton’s 70-year continuous relationship with the U.S. Navy - truly a client for life.

Everyone would like to have more of these long-term, institutional relationships - but what roadmap should you follow? During the research for my new book *All for One*, I studied over 50 flagship client relationships in an effort to determine how, precisely, great service firms consistently build and sustain such enduring client relationships. I wanted to know: What strategies do they use? Why do some client relationships grow, while others fade away? How do they turn individual relationships into institutional ones? What kind of organizational culture do they develop to support these giant “redwoods” that are seemingly impervious to storms and disease?

## Becoming a Trusted Client Partner

The telltale characteristics of a trusted client partnership will probably be familiar to many readers. The starting point is usually a single trusted advisor relationship with a key economic buyer at the client. Around this are then built many-to-many relationships at multiple levels in the client’s organization.

Often, the bond is forged in the crucible of a crisis, transition, or transformation. A personal relationship usually develops - you’re not necessarily best friends with the client, but you get to know each other as people and you probably end up helping them on a personal level in some important way. Invariably, the work advances the client’s agenda of important strategic and operational issues - these partnerships are not constructed on minor problems and commodity services.

What is striking is that these relationships are usually not the result of the derring-do of a single, powerful rainmaker. Nor do they prosper solely on the back of one unique or compelling service offering. Rather, they grow and develop due to an integrated set of *individual* and *institutional* capabilities that are rooted in a culture of collaboration and

client focus. In other words, the organization and management processes surrounding the rainmaker are just as important - if not more important - than the rainmaker him or herself.

## Going Beyond the Conventional Wisdom

To build trusted client partnerships, you have to reach well beyond the conventional wisdom about developing client relationships. What do I mean? For example:

1. *Conventional wisdom*: “Ultimately all client value boils down to either improving revenues or cutting costs.”

*Truth*: Value is tangible, intangible, institutional and personal; and you must deliver all of these - in a mixture tailored to your specific client - to build a trusted partnership.

2. *Conventional wisdom*: “Knowing your client’s business is critical.”

*Truth*: Mere client knowledge no longer sets you apart. You need to become an agenda setter who has built truly deep client knowledge and has a strong point of view about how your client can succeed, thus earning a seat at the table.

3. *Conventional wisdom*: “Consistent quality and delivery are essential to differentiate your service.”

*Truth*: These just get you in the game. Today, you need to differentiate your firm by creating a unique client experience.

4. *Conventional wisdom*: “Top executives are focused like a laser on value for money.”

*Truth*: Top executives are focused on value for time.

5. *Conventional wisdom*: “You have to be big and global to serve large clients well”

*Truth*: Today it is all about focus and making the parts work together well, not just size alone. Small firms can out-compete much larger ones.

## Becoming an Agenda Setter

There are a number of strategies for building trusted client partnerships, one of which I call “agenda setting.”

Small, expert-for-hire relationships can be built on *agenda reacting*, where you take orders. Trusted client partnerships, however, are based on a profound understanding of your clients’ agenda - their most critical priorities, needs, and goals - at both a company and a personal level.

As one CEO put it, “There are plenty of consultants, lawyers

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# Becoming an Agenda Setter

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and other professionals out there who have good technical skills. But that doesn't distinguish them. It's the ones who are able to really understand me and my business - who can connect what they are doing to my most important priorities and goals - who become part of my inner circle."

Agenda Setting requires a new level of investment in client understanding, and a broad-based knowledge of the key forces affecting your client's business.

An agenda-setting mindset is essential for connecting with c-level executives. One of my clients flew in a team from all over the world to meet with a CEO they had been wooing for over a year. They were determined to pitch a state-of-the-art system to him, one that they believed was critical to his company.

Fifteen minutes into the session, the CEO was tapping his foot, glancing at his BlackBerry, and looking around the room. He then abruptly got up, thanked the group for their time, and excused himself to attend another meeting.

A few days later, my client discovered a video of the CEO addressing an investor conference just days earlier. At the conference, he had laid out his new strategy - one for which, you can guess, my client's system had little relevance. They failed to connect with his agenda, and he disengaged immediately.

You can observe this yourself: when your client's attention wanders, it's a warning sign. You can refocus by asking, "What's the most important thing we should be talking about today?"

Effective agenda setting requires four things:

1. First, you must develop an appreciation for the pressures and concerns of top executives - you must be able to put yourself in their shoes and see the world through their lenses.
2. Second, you have to be creative in how you approach Agenda Setting, and learn the delicate art of executive conversations in which you indirectly tease out a client's most pressing issues without asking overused questions like "What keeps you up at night?"

You also have to tap into a variety of perspectives on a company's Agenda, such as that of the board and senior management, the marketplace (what are customers saying?), the organization (what do front-line managers think?), the capital markets (what is the perspective of investors?), and so on.

3. Third, you must learn to influence a client's agenda using intellect, emotions, metaphors, stories, and a variety of

other techniques. A PowerPoint slide deck just won't do it.

4. Finally, you have to be bold enough to hold specific agenda-setting conversations with your client, and to challenge or probe the implementation of their agenda.

Agenda setting is the first of multiple strategies that successful firms employ to build a trusted client partnership. It requires substantial investment, research, and conversational artistry, but it is the essential starting point for this journey.

## Becoming a Trusted Client Partner: 5 Steps for Institutionalizing and Growing Client Relationships

Why do some client relationships stumble along while others take off and grow? High quality work is always the starting point, and being in the right place at the right time - such as during a client crisis - can help. But there's much more. Later in this article on becoming a trusted client partner, I focus on a second key strategy: Institutionalization. Relationship growth will always be gated by the specific expertise of the lead professional in charge of the client, unless he or she takes specific steps to become a door-opener rather than a gate-keeper.

### Institutionalizing and Growing Client Relationships

One of the hardest journeys is evolving from an individual relationship to an institutional one, in the process broadening and growing the relationship. I like to think of this journey as a progression, from Contact - which is Level 1 - to Trusted Partner, or Level 6:

*Pre-client:*

**Level 1 - Contact:** You may have hundreds or even thousands of contacts - people you've met once or twice but with whom you otherwise have no particular relationship.

**Level 2 - Acquaintance:** Over time, you may get to know some of your contacts, and they may even become friends.

*Client:*

**Level 3 - Expert for Hire:** You've been hired to solve a specific problem. About you, the client would say, "He's very knowledgeable in that area, and did excellent work on a project for us."

**Level 4 - Steady Supplier:** At this level you've earned repeat business. The client might say, "We've had a relationship for a while now. She and her firm do a great job. We'll continue to use them in their area of expertise."

**Level 5 - Trusted Advisor:** In order to reach *Trusted Partner*, you've got to pass through this level. It's an important milestone, and by itself is an accomplishment. The client will say, "I've known him for a long time. He's superb at what he does, and has great business sense. I really trust his judgment, and will definitely use him as a sounding board for tough issues."

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## From the President

by David Zimmer

### Revitalize ICCA & Help the Unemployed at the Same Time

What do you do with an organization that is 33 years old, whose origin existed during a time almost considered ancient history, which resides in the fastest changing industry in all of time to keep it fresh and vibrant for its members?

Uh, that is the same question the National Board of Directors had and still has. So rather than come up with all the answers ourselves, we turned to a small group of our members (around 30) and solicited ideas from this select group on their thoughts to revitalize ICCA.

We received a plethora of ideas and suggestions. The response was truly encouraging. To those who responded, we, the board, say thank you and salute your commitment to the organization. I won't take the time to list all the ideas here, but I've summarized the suggestions into some categories with explanations.

#### Increase Cash

We intend to increase cash by adding to the existing membership, through membership and conference attendee sponsorships, DVD training seminars, and donations.

#### Increase Memberships

With the steep increase of unemployed or displaced IT staff and managers, the National Board started an initiative to build an extensive training seminar where a person can learn how to start and successfully run a consulting business. Steve Epner, using his experience of building and selling a successful IT consulting practice along with his strong ties to St. Louis University, is in the final stages of developing a 7 DVD plus 1 bonus IT Specific DVD training package which teaches the purchaser how to establish a company, prospect for business, meet the customers' need, and get paid while doing it. It is a complete A-to-Z session for newbies.

Riding on the success of several chapters attempts to recruit new members by offering "So You Want to be an IT Consultant" seminars, we will be able to offer this 8 DVD series for sale to the general public with special emphasis and follow-up with the attendees of the local chapters sessions. We will coordinate closely with the chapter to convert the attendees to members and sell them the DVD training. Members will receive a discount on the DVD set.

For those joining from the chapter seminars and buying the DVD series when joining ICCA we would like to offer them an additional discount.

Local chapters holding these introductory sessions will pass attendee contact information to National for follow-up and inclusion into future Constant Contact broadcasts. National will make every attempt of converting those prospects into members.

Students will be recruited from local universities and colleges. We are working with ex-board member Kevin Fessenden to leverage his very successful website focused on student mentoring - [www.ConsultantTree.com](http://www.ConsultantTree.com). The DVD training sessions will be offered to the students also. Pricing has not been established for either group.

We would like to create a similar seminar for more experienced consultants. The seminar will address common issues faced by this group, such as, how to grow the business, when to hire the first employee, collection issues, expanding services, etc. We will be looking for input, suggestions and help in developing this seminar.

#### Increase ICCA Public Exposure

Using webinars, SIGs, "You Make The Call" situational experiences, along with chapters and National advertising the seminars about becoming a consultant, ICCA plans to gain more public exposure. We will leverage our #1 Google rating to attract web-surfers and social networking to introduce people to ICCA.

#### What Can You Do To Contribute?

What will the next 33 years hold for the ICCA? What will it look like in ten years? Five years? Next year?

As you can see from the beginning of this article, the National Board does not have all the answers - never did, never will. The membership holds those keys. We need to evolve the ICCA from what it was to what it needs to become. We are taking steps, but once they are completed, what next?

We'd like to hear from you. What are you willing to suggest and shoulder to make it happen?



# Sales and Marketing - Align, Define and Make Money

by Colleen Stanley

The word misalign is defined as, “positioning or arranging something improperly in relation to something else.” Sounds like too many sales and marketing departments in corporate America. Even though the two departments share the same corporate office, the approach to engaging potential clients and existing customers is often disjointed. Here are six key areas of misalignment that cost companies lots of money each year:

**1. The marketing message doesn't match the customer's need.** Sales managers need to ask the marketing department to join their sales teams on daily calls and meetings. Marketing surveys and focus groups are good for research, but meeting with prospects and customers at their place of business is better. “Ride-a-longs,” as we call them in sales, is the best place for identifying needs and gaps in the company's product/service offering. It's the day-to-day interaction with prospects and customers that provide real-world data for identifying opportunities, challenges, and trends in the industry.

**2. There is a call to action but no training for the sales team.** The marketing program is working; leads are being generated, the right prospects are calling, and the new product launch looks like a success...until the phone is picked up by the untrained salesperson. The salesperson has received no education in building rapport on the telephone and has no well-crafted value proposition about the new product. The result is a beautiful marketing campaign with less than desirable sales results. Lots of money has been invested on the front-end of the marketing campaign to create opportunities, and zero money has been invested on the back-end to insure that sales can close the opportunity.

**3. The marketing message doesn't reach the real decision maker.** Business changed after 9/11 and the Dot Com Bust. Changes included more people, different people, and a shift in the power of each buying influence. Companies continue to market to old buying influences because the sales team is too busy selling to sit down with marketing to discuss: Who is buying; Why they are buying; New pain points; and Decision criteria.

The company is aggressively marketing...to the wrong people. Imagine going duck hunting in New York City...

**4. The marketing message doesn't match the follow-up by the salesperson.** How many of you have received literature on an exclusive resort or high-end product? The marketing program worked until you called to place your order. The salesperson on the telephone line doesn't sound exclusive, can't answer basic questions, and frankly, isn't that enthused about their own product/service. Enthusiasm

and confidence is contagious and in this case, the salesperson has driven you to, “I better keep looking.”

Ever experienced this one? Your marketing message promises that your consultants are “professional and knowledgeable,” but marketing and sales have not met to determine what “professional and knowledgeable” looks like on a sales call. For example:

- ♦ Professional - If the sales meeting requires a leave behind, does the marketing piece coincide with the prices you are charging? If your salesperson is a professional, are they showing up for the appointment five minutes early and in a suit that fits? Yes, I am tired of seeing too short, too tight or too big in the conference room.
- ♦ Knowledgeable - Has the organization figured out the FAQ's in your industry? Does the sales team know the answers? What about competitive analysis? Does the salesperson know the gaps in the competition's service offering so he/she can better position the call?

**5. Using email marketing and follow-up by sales.** Email is an inexpensive way to drip market to prospects. Prospects responding to email versus other types of marketing require a different type of follow-up. Traditionally, salespeople immediately pick up the phone to follow up on the lead. The email prospect doesn't want a phone call and is often turned off by this type of follow-up. The marketing is generating a response; however, the effectiveness of the campaign is diminished because of an ineffective follow-up plan.

**6. Good repeat customers are ignored and the focus is on new business development only.** Everyone in business knows it's more profitable to grow an existing account than to prospect for new business. When working with sales teams on strategic account management, I often hear, “I'm not sure if my customers know about our full service offerings.” That is a sales problem and a marketing problem. Marketing can assist sales by making sure customers are aware of the depth and breadth offered by the organization through articles, special events, newsletters, direct mail, emails, etc. Sales can follow up by setting up business review meetings to discuss other products and services offered by the organization.

Align your sales and marketing organization. Togetherness is not just for romance - it's a very good way to make money. □

*Colleen Stanley is founder and president of SalesLeadership, Inc. She is co-author of "Motivational Selling" and author of "Growing Great Sales Teams: Lessons from the Cornfield". Colleen is also the creator of the EI Selling System™, a unique and powerful sales program that integrates emotional intelligence skills with consultative sales skills. Visit [www.salesleadershipdevelopment.com](http://www.salesleadershipdevelopment.com) or call 303-708-1128.*

# Twitter, MySpace and Facebook Demystified

by Ted Janusz

**Q:** *I hear people talking about websites like Twitter, MySpace and Facebook. What are they? And, even more importantly, should I be using them to promote my computer consulting business?*

Tools like Twitter, Facebook and MySpace are components of something else you may have heard people talking about: **Web 2.0**, which is a popular term for Internet applications for which the users are actively engaged in creating and distributing web content.

Web 1.0 probably consisted of the websites you saw back in the late 90s, which were nothing more than fancy electronic brochures. Web 1.5 would have been something like Amazon or eBay, sites on which you can buy, sell and leave reviews. What Web 3.0 will look like is anybody's guess!

Let's look specifically at the three applications that you mentioned.

## Tweet, Tweet

**Twitter** - "Twitter is like text messaging, only you can also do it from the web," says Dan Tynan, the author of the Tynan on Technology blog. "Instead of sending a message to just one person, you can send it to thousands of people at once. You can choose to follow anyone's update (called "tweets") simply by clicking the follow button on their profile, or vice-versa. The only rule is that each tweet can be no longer than 140 characters."

Former CEO of Twitter, Jack Dorsey once accepted an award for Twitter by saying, "We'd like to thank you in 140 characters or less. And we just did!"

According to ComScore, Twitter is the fastest-growing major website in the United States with 17 million registered users. That's up 3,000% from a year ago.

This is fine, but what is the business application of Twitter?

In the past, companies would need to spend hundreds of thousands of dollars on marketing research to find out what consumers were saying about them. Now companies like Comcast, Dell, HR Block, Kodak, Southwest Airlines and Whole Foods can "follow" what real customers are saying about them in real time. And they can answer questions and resolve complaints from real customers immediately, if they so choose.

The Toledo Blade even sends tweets that are headlines,

along with "tiny URLs," which are links back to the full story.

## Top Websites

According to Google Trends, the number one website in the United States is **Yahoo**, followed by **YouTube**. The third most visited site, in a tie, is **MySpace** and **Facebook**.

**YouTube** was started by three former employees of PayPal, and then sold to Google about a year later for \$1.65 billion dollars. (Wouldn't you like to know what they're going to do next? You'd probably be willing to lend them a few shekles to invest in their future venture.)

Unlike the other sites we'll discuss that allow for the posting of words and photos, YouTube is the number one video-sharing website. Best of all, you can post your video on the site for free. A simple flip video camera (priced at under \$150 on Amazon.com) can do the trick for you.

What is the business application of YouTube?

Let's examine some successful examples:

- ♦ **Blendtec** - a Utah-based manufacturer of blenders posted a series of videos entitled "Will it Blend?" In these videos the company attempted to pulverize items such as golf balls and iPods. The first eight episodes resulted in three million downloads in a week. Even better for Blendtec, they sold out of the \$600 blender - in the first 24 hours.
- ♦ **Diet Coke + Mentos** - Check out the geysers this combination creates in a series of videos on YouTube by typing "Diet Coke + Mentos" in the search box at [www.youtube.com](http://www.youtube.com). While Coca-Cola stayed away from promoting this phenomenon (perhaps out of fear of litigation), Perfetti (the maker of Mentos) jumped in with both feet, posting both a large link to YouTube on its website and sponsoring its own contest. In the process, they sold a lot of mints.

The key to business success on YouTube:

Do not post a video of your company president in a head shot saying blah-blah-blah. Nobody will view it. To be noticed on YouTube, be sure to be **humorous, offbeat** or **very personal**.

**MySpace** - Tom Anderson and Chris DeWolfe designed a website to provide a service at no charge to regular people looking for a way to connect with others having similar

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## Twitter, MySpace and Facebook

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likes and dislikes. The site was initially popular with bands, who didn't want to go through the hassle of creating and maintaining a website, but sought a way to distribute their music, photographs, videos and other information to their fans and would-be fans. MySpace usage has since spread like wildfire to people of all interests and ages.

Yes, MySpace initially appealed to teenagers, but now half of the visitors to the site are age 35 or older as the site's demographic composition continues to shift.

What is the business application of MySpace?

Successful marketing using any of the Web 2.0 applications means an ad cannot look like an ad or else it will be rejected immediately by the social networking visitors.

To see how companies have successfully launched a presence on MySpace, check out Cartier International ([www.myspace.com/lovebycartier](http://www.myspace.com/lovebycartier)). But for my favorite, look for Miss Helga, a spokesperson for Volkswagen ([www.myspace.com/misshelga](http://www.myspace.com/misshelga)).

According to ComScore, in May 2009, Facebook for the first time tied MySpace in the number of users in the United States, at 70 million a piece. However, Facebook stands alone as the number two website in the rest of the world (behind YouTube), surpassing MySpace internationally in April 2008. Since its usage has doubled in the last year, total Facebook users outnumber MySpace users worldwide, by 200 million to 125 million.

Facebook was originally created by Mark Zuckerman, intended for use by his fellow students of Harvard University as "The Facebook." It was meant to be an online replacement of the book one receives as freshmen when entering college or university containing photos and other information about our new freshman classmates. Within 30 days, about half of the students of Harvard had a profile on the site. Facebook soon spread to other Boston area colleges. Presently, approximately 85 percent of all college students have a presence on Facebook.

Facebook has been able to overtake MySpace as the number one social networking site in the world because it no longer has the stigma that it is "just for high school or college students." Anyone may now join Facebook.

Sites like MySpace and Facebook are so popular because social networking allows so much more than e-mail or text messaging. In addition to writing on someone else's "wall"

on Facebook, sharing photographs and videos. With over a billion photos and over 14 million added each day, Facebook is the number one photo-sharing site on the Internet. At a glance, you can see what all of your "friends" are up to. And because you choose your friends on Facebook, you can virtually eliminate spam, spam composes up to 90% of all e-mail.

What is the business application of Facebook?

People have a "profile" on Facebook, whereas a business has a "page." You and I can have "friends" on Facebook, while a business has "fans." Businesses on Facebook can really benefit as Facebook is the trusted referrals of their friends, which is something missing from the monologue of advertising.

### How can you put it all together?

According to USA Today, Harley-Davidson's corporate profiles on MySpace (36,000 friends) and Facebook (175,000 fans) let it solicit comments from fiercely loyal customers. Harley also uses Twitter (@harleydavidson; 4,000 followers) and produces videos of its motorcycles on YouTube.

But there is a danger for businesses to view the social networking sites as the new television, but a business can advertise on them for free.

"If you are going to go there, you had better go for the right reasons," says Seth Godin, author of the best-selling book on marketing, *Purple Cow*. "And if your reason is to sell more stuff, please don't bother. It's not going to work. People don't care about you. They just don't."

On the other hand, if you can use social networking sites as ways to connect to real people, just for that sake alone, not because you want to sell anything, then it's a great way to spend a half hour a day."

Godin concludes, "And what we are finding, as a by-product of that . . . yes, in fact, your business will do better, because you are a trusted member of the community. Not because you are trying to sell stuff." □

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# Interlocking Accountability

by Andrea Sigetich

In organizations, where we accomplish work with and through others, we need more than individual accountability - we need TEAM accountability. Team accountability occurs when we take ownership and answer for our own conduct and obligations with others; where we create an environment in which people can count on each other. This team accountability is also known as “Interlocking Accountability.”

Imagine your team is asked to create a company overview for a prospective client. The task requires many members of the team to contribute. With interlocking accountability, we can think of the team members as spokes in the same wagon wheel; each contributing to the balance and smooth functioning of the larger entity. In interlocking accountability, each team member is accountable to all effected team members for his or her relationships, performance, and agreements; and each team member is accountable for holding other team members accountable for either breaking an agreement or keeping it.

The behaviors of interlocking accountability are simple - we use each situation, task, and opportunity at work to learn and improve our self, and to support others. We emphasize individual accountability as it contributes to the whole.

## The Accountability Continuum



Accountability is a priority everywhere, no matter the size, revenues, geographic locale, number of employees, or industry in which an organization operates. One challenge is to get employees to the point of individual accountability; however, this achievement is but an early milestone in the progression toward Interlocking Accountability. Accountability spans a continuum that begins with entitlement mentality and ends with interlocking accountability. In an entitlement mentality, an employee expects to be paid for showing up on the job, regardless of effort. With this mindset, morale is threatened by indifference to the work and to each other. Some of the language that pervades this mentality includes, “All I have to do is show up;” or “You owe it to me;” or “It’s not my job.” Here, sadly, no one addresses performance issues. Far too many organizations remain mired in this place, unable or unwilling to establish the systems - reward systems, performance management systems, cultural systems, and more - to eradicate these

wasteful and detrimental attitudes and behaviors.

Moving forward on our accountability continuum, employees begin to accept individual accountability, and take full responsibility to complete their own assignments. The down side of this phase is that employees are neither aware of nor concerned with how their outputs affect others. Inconsistency and redundancy can lead to employee confusion, inefficiency, and frustration.

Moving beyond individual accountability, individuals working together progress to a phase of team accountability, characterized by an attitude that team success is more important than that of individuals. Though we have witnessed many intact work teams - from sales teams to product design groups - operate synergistically in this mode, what’s missing is the critical interaction among and between these teams throughout the organization.

When a company reaches the pinnacle - interlocking accountability - achievement of the overarching organizational goal is more important than the priorities of individuals and teams. Here, the organization is adaptable and agile because resources are efficiently used across functions, decision-making is based on the organization’s needs, and coordination is high, territorialism and competition are low.

## Accountability and Culture

The reality of today’s competitive global workplace creates more risk and a rockier road than ever before. Even small organizations can be playing in the international arena - an environment that can be politically charged and culturally demanding. In the global workplace, organizations are competing against complex processes, technologies, and products, with little room for trial and error. Organizations that establish a culture to support and encourage individual AND organizational accountability will attain the most success. In these successful organizations:

- ◆ Each employee feels responsible for the success of the organization - there is pride in and ownership of work product and results.
- ◆ The culture supports the surfacing and exploration of mistakes and errors - there’s no such thing as failure; employees do not fear mistakes - they embrace them as opportunities to learn and improve.
- ◆ Skeptics and doubters are encouraged - it’s a culture that welcomes challenges and “push back” in which

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# When Good Ideas Go Bad

## 3 Steps for Keeping Your Poor Idea from Becoming a Disaster

by Vickie Sullivan

Well, it looked good on paper. You knew that new service line or new sales campaign would generate huge returns. But even the best of us don't hit home runs every time at bat. Sometimes your best efforts just don't pay off. Unfortunately, the lack of results doesn't come with an explanation. Buyers simply don't respond. Silence is difficult to interpret. Your new dilemma is what to do next. Below are three steps to change course when plans go awry.

### First Step: Stop

When initial results are lacking, it's tempting to keep going. The logic: The plan will work if we just work the plan. Like a car stuck in a muddy ditch, continuing to punch the gas pedal results in spinning your wheels (and sinking faster in the mud).

The best approach is counter-intuitive: Stop what you are doing. If your current efforts are not working, there is no use in throwing good resources after bad tactics. If you're not getting a good response, no one will notice that you've stopped anyway. Finish up any loose ends and don't start any new experiments to revive your campaign. You need time to think and drill down.

This is easier said than done. When things go wrong, it's comforting to take some kind of action. Usually we repeat the same tactics, but with more gusto, or we constantly tinker, which continues the delusion that the campaign was a good idea in the first place. Then, there is the emotional aspect of disappointment: If you quit now, you have to admit failure.

**A Story:** Consultant-turned-author, Billy Bob wanted to write a best-selling book. He got the publishing deal, spent a year writing the book, and hired a PR firm to promote it. After three months of little press, he was concerned, but the PR folks said, "Stick with us. These things take time. Pay us more money and we'll send out more press releases." Billy Bob stuck with the ineffective media plan because he didn't want to "waste" the year he spent writing. If he would've stopped after the first warning signs, Billy Bob could've introduced new tactics with better success.

**Your Next Best Step:** When you accept that your plan isn't working, you are really free to see the situation in a more objective way. And that perspective can spawn solutions that were never considered before. Ask yourself: What were the lessons learned from my experience? What

am I willing to do to make this work?

### Second Step: Separate the Moving Parts and Make a Few Incremental Changes

When you finally let go and admit that the plan isn't working, it's easy to go to the other extreme and abandon the project. This mistake creates urgency on finding an alternative that might turn out to be worse. (This is also known as jumping out of the frying pan and into the fire.)

Before you throw out the entire project, take it apart first. Failure comes in many flavors. You have to drill down and get specific:

- ♦ Is the feasibility off because the market changed?
- ♦ Were there ramifications to this campaign that you didn't anticipate?
- ♦ Is your brand not compelling enough to make the tactics work?
- ♦ Does some element of the execution need to be adjusted?

At this point, you don't know if one small component is doing all the damage or if the entire campaign is not worth fixing. To figure out the best move forward, you have to step back and separate all the elements and look at each one.

**Our Story Continues:** Because of his lack of experience with the PR firm, Billy Bob decided that all PR firms were inept and vowed never to work with one again. He still wanted that book to be a best-seller, so he launched a media campaign by himself. Unfortunately, he got the same result. Because the editors didn't respond to his press releases, Billy Bob didn't know the reason behind the lack of response. Therefore, he didn't know how his efforts should differ from the "inept" PR firm.

**Your Next Best Step:** Separate every aspect of the project and ask yourself: Is this part working? If not, what needs to change? The more moving parts you have, the more incremental the changes will be. Make those small changes to the most obvious problems first. If the results don't get better, move to the third step.

### Third Step: Redefine Success Based on New Information and Create a New Plan of Action

If you're not getting the results after making incremental changes from the second step, you now have to make the big decision: Should you tweak the current plan or launch something new?

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## Interlocking Accountability

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important questions such as “Why?” and “Why not?” are readily asked and answered.

- ♦ Diversity of thought is the norm - multiple points of view are solicited for decisionmaking, problem solving, and other creative processes.
- ♦ Recognizing, accepting, and resolving conflict is seen as something to “lean into,” embrace, and manage - not something to avoid.
- ♦ Every employee in the organization understands and appreciates the fact that front-line workers see and hear everything - that they have access to important information regarding customer perceptions, operational effectiveness, employee relations, and much more. Connectivity with the front line occurs in every direction, including through vendor, client, and top management relationships. This insight is continuously sought, weighed, and acted upon.
- ♦ Adjustment and recovery plans are created, and the organization is fully ready to flexibly implement them - contingencies and fallback positions are well thought out and ready, allowing the organization to be nimble and agile.
- ♦ Decision-making shifts to those with the most expertise by which to make them - politics and power plays are left behind in favor of the right people being involved in the right decisions to make the right choices.

### Your Action Planning

Ironically, Interlocking Accountability ultimately circles back around to Individual Accountability - what can and will you do to make this happen? When it comes to the tactics you'll pursue, it's simple - it's your choice, so you

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## When Good Ideas Go Bad

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There are pros and cons to each option. The deciding factor lies in your tolerance for chaos. Whatever change you make cannot result in lateral moves. Any change creates chaos, and so you must either improve your condition or not bother.

**Our Story Concludes:** After talking to a marketing consultant and other insiders in the publishing industry, Billy Bob learned that the topic of his book (manufacturing on a shoestring) is not best-seller material. Therefore, he changed his strategy to use the book to get more consulting clients. His media campaign focused on article placement in industry journals.

This plan got great results: He received many invitations to

decide! Here are some questions that can help...

First, what actions do you choose in order to create personal accountability and model it for others? Second, what actions can you take to improve team accountability? Third, what do you commit to? How will you get started? When? What support and buy-in will you need? Finally, how will you know when you and your team are successful?

Remember to:

- ♦ Follow-up on commitments you've made.
- ♦ Monitor progress - yours and that of your direct reports.
- ♦ Challenge team members to hold each other accountable with acknowledgement and support, building safety for the team.
- ♦ Facilitate the team in creating action plans for accomplishing a vision.
- ♦ Design clear team commitments, periodically check on progress and re-negotiate as needed.
- ♦ Assist the team in measuring performance.
- ♦ Provide the team with clear choices.
- ♦ Delegate accountabilities.
- ♦ Link actions to visions.

As a leader, how can you create and promote organizational interlocking accountability? Wouldn't it be great to work in an organization where we each can truly count on one another?

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write articles and several speaking engagements as well. Bottom line: Billy Bob's year of writing wasn't wasted.

**Your Next Best Step:** If the incremental changes don't work, it might be time to change what you want. Go back to basics and investigate the overall feasibility of your strategy. Ask yourself: If I can't have this anymore, what can I have? What else is out there? And, given the lessons learned, what am I willing to do to get my outcome?

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# Becoming an Agenda Setter

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**Level 6 - Trusted Partner:** At this stage the relationship is broad and deep. There are many-to-many relationships, and the client probably uses a wide range of service from you. In talking about their trusted partnership relationships, clients have often said to me something like this: “We view them as a long-term partner in growing our business. They’ve built many strong relationships with our people and they consistently add value. I feel that we get the best that their firm can offer.”

In studying a large number of these trusted client partnerships, I have observed the consistent use of five specific growth strategies or pathways. These are:

**1. Relationship Expansion:** This means building many-to-many relationships with the client’s organization, and also expanding and strengthening your *internal* relationships at your firm. As one chief financial officer put it, “When we make a decision about which firm to go with for a major transaction or project, I get all of my staff together, and every head must nod.” It’s no longer about just a single connection. On the other side, my research shows that your internal connections - your ability to identify and draw in the right colleagues and firm resources to the relationship - become essential to successful relationship expansion, especially as the size and scope of the relationship grows.

**2. Capabilities Expansion:** Clients like to pigeon-hole their external advisors, and it’s your job to demonstrate your breadth. You do this, first of all, by connecting to your client’s agenda and being agile in talking about his or her broad business issues; and then building trust in your ability to help address them. You can develop this trust by *showcasing* your firm’s capabilities.

This can be done in many different ways. You might bring in other colleagues who are “branded experts”; introduce your client to another client who has used you for a broader range of services; invest time to develop an incisive point of view on an issue of importance to your client - I call this the “deep dive”; or even organize an all-day workshop around a specific topic where you bring in your experts to meet with their counterparts in the client’s organization.

Remember that “cross selling” rarely works - it’s a seriously discredited notion. Integrated or solution selling does work, where you identify a need, illustrate how you can meet it, build trust in your capability, and then allow the client to become a buyer. Most professionals know they should be doing this, but their “expert” mindset gets in the way.

**3. Relationship Management Intensity:** To go from good to great with a client, you have to become much more focused and systematic about a broad set of relationship management activities. These include regular

communications, formal expectations setting, systematic orchestration of many-to-many relationships, and so on. At the Expert for Hire, Steady Supplier, and Trusted Advisor levels, you can get away with low-key, ad-hoc, informal relationship management - but that’s not sufficient to sustain a Trusted Partnership.

**4. Team Leadership:** Trusted Client Partnerships are built by teams, not one or two individuals, and you want *your* client relationship to become a place where the best professionals in your firm aspire to work. In any professional services firm, all of the associates know which partners are awful to work for and which ones create a great environment on their teams - and they avoid the former like the plague. You have to go from simply staffing a project to leading and inspiring a team, coaching the individuals on it, and showing a keen interest in their personal development.

**5. Client Account Planning:** Effective client account planning is the fuel that energizes the first four growth pathways. Remember that “no client plan survives contact with the client.” Account planning should be a dynamic process that involves the client and creates an ongoing dialogue that focuses on five key questions:

- ♦ What is this client’s agenda? What are the most challenging issues that the client faces, and how can we help?
- ♦ What are our aspirations for this relationship?
- ♦ Which potential opportunities do we want to invest in, and what actions can we take to pursue them?
- ♦ What individual relationships do we need to develop and/or deepen?
- ♦ Do we have the right team in place to grow this client relationship? How can we best leverage the people, ideas, and resources of the firm to help this client achieve its goals?

Two other important factors underlie client relationship growth. The first is one you can control - it’s *focus*. These large-scale relationships just don’t develop without a significant concentration of resources. One of my clients, for example, invested one full year of a partner’s time to build a relationship with a major Fortune-100 company. It paid off, ultimately, with a \$20 million consulting assignment. It’s an extreme case, but a noteworthy one that also illustrates the need for risk syndication - for indemnifying individual professionals who make these investments - when trying to build Level 6 relationships.

The second factor has to do with the ambition of your client. Ralph Shrader, the chief executive of Booz Allen Hamilton, put it this way to me: “In order to build a broad-based, institutional relationship, you have to have a client who is intent on accomplishing his goals but who also sees himself as part of a larger mission. The client has to realize he is on a

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# Becoming an Agenda Setter

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bigger stage and can accomplish something very significant.”

## Your Relationships Matter: 9 Ways to Create Valuable Experiences that Build Client Partnerships

In many markets, we are seeing a fundamental shift in the way value is created for customers. The shift is from value that resides in the product or service to value that is created for the customer during the experience of interacting with the service provider. Increasingly, it is at the points of interaction where value is created, not in the factory or R&D laboratory. In the consumer market, think of the truly special experience of browsing in an Apple retail store, or the high-end lounges that airlines like Lufthansa and British Airways have created to augment the in-air experience with a luxurious on-the-ground experience.

This phenomenon is poised to dramatically affect the world of professional services. Most firms say they offer a unique client experience, but few actually do. The challenge is to create new, refreshing, and valuable client interactions which become part of the total package of your value-added. The issue is that most professional services are delivered today in almost exactly the same way as they were forty years ago. There is more on-site work, for sure, but still very little client involvement in defining the desired relationship experience.

### Creating a Unique Client Experience

Here are some examples of how firms have taken steps to tailor and differentiate the relationship experience. The ultimate goal is to add more value through the relationship experience itself, reduce risk for both sides, and decrease the overall cost of doing business together:

**1. Client Forums:** The world's leading environmental consulting firm sponsors a 3-day intensive forum that brings together a group of environmental directors to share best practices and discuss critical industry issues. Professionally facilitated, it resembles an executive MBA program or alumni college as opposed to the golfing boondoggles that many firms put on. The sessions are so popular there is a waiting list to attend - they turn clients down for each forum.

**2. Joint Business Development:** A telecommunications services company uses a joint strategic planning session as the basis for developing any new business proposal. Rather than sitting in their office to write a proposal, their executives do it jointly with the client during the course of a value-added workshop.

**3. Simulations:** A law firm created a simulated trial for a non-US client that was considering going to court rather than settling a major lawsuit. The simulation included a judge, jury, and courtroom spectators, and allowed the client to experience first-hand what they would face during

the litigation.

A large consulting firm developed a powerful war-gaming capability for the US government, which they have subsequently used with private-sector corporations to simulate strategic options and the resultant market share gains and losses. For a client's leadership team, participating in this three-day exercise is an intense, unique experience.

**4. Customizing an Entire Firm:** A large marketing services company won a major computer maker's worldwide advertising and marketing business - and in the process replaced 800 smaller firms they had been using around the globe - by actually creating a dedicated agency staffed by 1,000 professionals.

**5. Expectations Setting:** A big-4 accounting firm uses a unique expectations-setting process with its clients called a "strategic enablement" discussion. During this meeting, a partner works with the client to define what success will look like, what the client's expectations are for the relationship, how the first year of an audit or tax engagement will typically progress, and what, overall, the client can expect from the firm.

**6. Giving Pricing Control to Clients:** Some professional firms have given their clients a degree of control over pricing, for example by creating a 15% "holdback" of fees which are paid based on satisfaction with the work done. There are no complicated metrics, no tracking of specific results - satisfaction in this case is defined qualitatively by the client.

**7. Creating a New Business Model for Service Delivery:** Some firms, such as Bain & Company in consulting and Egon Zehnder in executive search, have developed new delivery models which altered the client relationship experience and increased client value.

When it was founded in the 1970s, Bain differentiated itself from McKinsey and BCG by extending its work into implementation; and Egon Zehnder created his firm by overturning many of the traditional foundations of executive search, such as the use of success fees (he believed that a fixed fee better aligned his and the client's interests) and a one-firm measurement and reward policy.

**8. Joint Client Account Planning:** Most annual account planning exercises are one-sided. They are done by the client service team, and tend to be divorced from the client's own agenda. Some firms conduct joint account planning sessions, where they go to the client and say "We are doing our planning for next year, and want to make sure we have the right resources focused on serving you. We'd like to sit down and make sure we understand your plans and potential needs going forward, and also share with you some ideas we've

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developed for your business and get your reactions to them.”

**9. Using Virtual Experience Environments:** Many firms are experimenting with virtual experience environments, using Linden Lab’s Second Life virtual world to interview job candidates, conduct training seminars, hold workshops, and test market new products and services.

These examples illustrate some of the main pathways that you can explore in order to design a unique client experience.

### Creating Your Own Unique Client Experiences

Specifically, you need to ask yourself questions around four areas:

**1. Dialogue:** *Are there opportunities to increase the amount of dialogue with clients?* You need to push yourself to think about new lines of communications and new interactions that would enhance a client’s (and your) understanding of the issues and their perspective on the problem.

**2. Network and Access:** *Could you involve new players in the relationship - from your firm, the client’s organization, and other constituencies?* This could include getting your client’s leadership more involved in your engagement, new and different colleagues from your firm, or even outsiders that can bring unique perspectives (industry experts, academics, your client’s customers, etc.).

**3. Transparency:** *Could you make some of your work processes and decisions more transparent to the client (and to your own staff)?* Transparency increases trust, and it enhances a client’s perception of value. Think about all of the different aspects of your business development and delivery process, and see if there are some that could be done jointly or more collaboratively with the client.

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## Networking Made Easy

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an interesting website. To follow up in person, schedule lunch or coffee, or invite your contacts to an upcoming event you plan to attend.

Once you have a large follow-up list, it’s a good idea to publish a regular newsletter or ezine, or send out periodic postcard mailings. But this type of mass follow-up shouldn’t be considered a substitute for making personal contact. Your contacts still need to hear from you personally from time to time.

### Follow-Up Can Be Simple, Even If It’s Not Easy

This systematic approach to following up with new contacts

**4. Experience:** *Are there opportunities to create new experiences and new experience environments for the client?* Studies have shown that getting into new environments with people can enhance feelings of likeability and trust. Can you hold a meeting offsite instead of in the usual conference room? Could you go have a cup of coffee with your client down the street rather than sit in their office? Can you turn what would normally be a one-way “sales pitch” into a highly collaborative experience for your client? Think about ways to change and enhance the experience environments in which you and your client interact.

The goal should be to have your client say, “Working with them really is different!”

### The Final Ingredients: Focus and Trust

The final ingredients of trusted client partnerships are focus and confidence. These large-scale relationships cannot be developed on a haphazard basis - they require dedicated professionals and extensive firm-level support in order to prosper. Confidence in your capabilities is also essential.

I have seen trusted client partner relationships developed by very small firms and also very large ones, by market leaders and by unknown upstarts. The first sale is to yourself, and if you believe that you belong in the C-suite and that your firm should be your client’s most important advisor, then you’ve already won half the battle. If you don’t believe these things, why should your clients? □

*Copyright © 2009 by Andrew Sobel. Andrew is a leading authority on client relationships and the skills and strategies required to earn enduring client loyalty. He is a consultant and educator to major services firms worldwide. He is the author of the recently published All for One: 10 Strategies for Building Trusted Client Partnerships, as well as the business bestsellers Clients for Life and Making Rain. He can be reached at [www.andrewsobel.com](http://www.andrewsobel.com) or by phone at 505-982-0211.*

can take some of the pain out of the follow-up process. By establishing a methodical approach to consistently following up with people you meet, you’ll begin to see a much higher payoff from networking.

And if some of those business cards you have collected belong to people who are neither prospective customers nor potential referral sources, just throw them away. There’s no point in keeping the cards of people you don’t plan to follow up with. □

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# Managers: Communicating Expectations and Aligning Performance Goals to Achieve Exceptional Results

by Greg Jerralds

**M**anagers are expected to play a significant role in the success of each team member's performance. In addition to performing the four primary management functions (planning, organizing, directing, and controlling), managers are responsible for establishing the right performance measurements and tools as well as communicating clear goals and expectations to their team members. When managers perform their role well, so do their team members.

Make no mistake...managers must do more than simply communicate what they expect. The performance measurements and expectations they provide must not only align with the company's business strategy, but also lead to desired outcomes. Failure in this area can be extremely counter-productive to the overall success of the business.

Neglecting to provide clear goals and expectations timely, or at all, generally places team members at a significant disadvantage. This often causes team members to fall short of meeting the established goals. Remember, when the proper performance measurements are not in place, and team members don't know what is expected of them to achieve success, the business will certainly struggle to achieve its full profit potential.

## Communication and Reinforcement

Performance expectations should be communicated to team members as early in the new hire orientation process as possible, and then be continuously reinforced throughout their employment. In fact, the sooner team members learn what is expected of their performance, the sooner they will begin performing to meet, or in the case of your top performer, exceed expectations. Continuous reinforcement should occur in the form of ongoing follow-up discussions, one-on-one communication sessions, employee coaching, and ongoing development initiatives.

Providing ongoing coaching and development should not be limited to newly hired team members. As team members gain more tenure and experience, managers should adjust their performance goals accordingly: goals should be challenging, yet attainable. When expectations are clearly communicated, and team members feel supported by their manager, they generally perform with greater enthusiasm and drive.

## Ownership and Accountability

A word of caution... managers should never present performance goals as "handed down by senior management." Employees often see those goals as unrealistic, out of touch with reality, and impossible to achieve. Even if the goals are a mandate from the "top," the goal setting and administration process is much more effective when the team members feel involved in the process.

Allow your team members to contribute to the goal setting process, when possible. Simply encouraging their involvement, even in the slightest capacity (e.g., designing the goal attainment tracking form), generally increases their level of commitment, and tends to lead to a higher level of employee ownership, accountability and performance. Remember, it's not managers who complete the tasks needed to achieve the goals; it's the team members who work for them.

Once goals are clearly defined and communicated, it is vital for managers to develop the tools needed to accurately measure and track each employee's performance. Openly posting performance results and periodically meeting with team members to review their individual progress is a key step in achieving and sustaining desired results.

## Motivation and Recognition

Once the right performance measurements and tools are in place and performance expectations clearly defined and communicated, the manager's next task is to ensure the team members are productive. One way to keep team members performing at optimal levels is to implement a rewards and recognition program. This will help to motivate employees as well as insure top performing team members receive the recognition they have earned. And, for your top performing team members who may have mastered their job functions, managers should recognize them by finding new tasks and assignments to further expand their knowledge, skills and abilities.

Recognition comes in many forms: monetary, such as spot and period bonuses; opportunities for growth and exposure, such as assisting with special projects or assignments; and greater responsibilities, such as acting team leader or supervisor. Whichever combination you decide, be sure that every team member understands the

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# Redefining Professional Service Firm Marketing and Business Development

by Suzanne Lowe

Not surprisingly, one's understanding of a term leads directly to one's expectation about an organization's roles and functions. And, in the professional and business services arena, the definitions of the terms *marketing* and *business development* vary widely from individual to individual, firm to firm, and sector to sector. These variable levels of understanding create enormous barriers to effective marketing and business development.

In preparing to write *The Integration Imperative*, I encountered this variability time and again when I interviewed my informal advisory group of senior-level PSF and B2B marketers and executives about the book's content. During those interviews, I learned the extent to which each person had different perspectives and definitions for many of the terms I used.

After the first few interviews, I decided to define my terms before describing the issues and models of the book. Once we were on common ground, my interviewees were able to offer substantive guidance. If misunderstandings of terms occur among deeply experienced senior marketers like us, you can only imagine the extent to which they occur among other marketers, business developers, and their practitioner colleagues. Or when marketers and business developers move from one service sector to another.

## Developing a Common Lexicon

The professional service arena is made up of numerous distinct sectors: engineering has its own practice-oriented terminology, which differs from law, or management consulting, or executive search. And so on. Of course, because the practices of each field are so radically different, the vocabulary of each field will always maintain significant levels of distinction.

Regarding the fields of marketing and business development, there is a different reason why a common lexicon has not yet been developed. Because PSF or B2B practitioners do not receive much instruction (if any) in marketing during their academic or professional preparation, they typically assign great weight to what they learn from their professional experiences. They learn about marketing and business development on the job. As these people move from firm to firm, they bring with them their individual understandings of what marketing and selling were as these functions were practiced in the firm at the time. They then inevitably create their own lexicons.

From these personal lexicons, they build expectations about what's going to happen in their interactions with marketers and business developers, and about the results they and their firm should be able to realize. Even with the best of intentions, too often these practitioners assume they understand what their marketers and business developers mean when they use terms from their own lexicons. The misunderstandings that occur often lead to perceptions that marketers and business developers are not performing to expectations.

Let's look at an example - the term *return on investment* - when applied to the number of people one might expect to accept an invitation to a client seminar. Based on their knowledge of the quality of the invitation list (a "cold" list of people who are largely unaware of the sponsoring firm versus a "warm" list of loyal clients and influencers), most professional marketers understand the return they should expect from the seminar invitation list being used. But a lawyer or an executive search consultant might not.

Bingo - because they simply misunderstood the marketer's definition of the term *return on investment* when applied to an invitation list, practitioners' expectations may not be met. The first internal barriers are erected. (Of course, barriers like this could be avoided if all participants in a professional firm's marketing program communicated effectively with each other, but that's a topic for another day.)

## It's Time to Reframe What Marketing and Business Development Mean!

I've used the tactical example above to illustrate my larger point about the imperative to redefine the bigger picture of marketing and business development. When it comes to these critical functions, the distinct sectors comprising the larger arena of professional services have yet to coalesce "up" into what should be an overarching lexicon for all professional services marketing and business development. A new lexicon is critical to introducing people to a newer and more expansive way of perceiving marketing and business development. It's also vital in reducing the unmatched expectations that too often are found among the practitioner populations of PSF and B2B firms. A new lexicon effectively addresses the expectations disconnect that so often prevails within firms.

Reframing our understanding of the body of PSF and B2B marketing and selling practices is a natural step in the

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# Managers: Communicating

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relationship between exceptional performance and being rewarded and recognized for achieving it.

## 7 Quick Reference Steps

Here are seven quick reference steps to help managers lead their teams to achieve exceptional performance results:

**1. Establish a strategic alliance with your human resources managers.** Managers must begin to recognize their HR managers as strategic partners, and then begin to leverage that relationship to overcome barriers, ensure consistency, and further develop employees' core competencies. HR can help to insure your department goals and expectations are in line with your company's business strategy.

**2. Align your performance goals with your company's business strategy.** When goals are not properly aligned, it places significant risk on the company, particularly when employees are focusing on and achieving department goals that are in direct conflict with the company's overall strategic direction. This increases your risk of losing customers and employees and it also negatively impacts your profitability.

**3. Increase your level of effective communication and collaboration.** Rather than retain vital information, managers should share it with those who need it most, their team members. When employees are robbed of the critical information they need to perform their job, they become unsure of the company's direction, purpose, and most importantly, how their personal successes and failures impact the company's ability to make a profit.

**4. Provide continuous employee coaching and development.** Far too often, managers avoid providing their team members with ongoing coaching and development. This probably is the most common of the five areas, and the most detrimental to any company's ability to be competitive, improve customer satisfaction and increase profitability.

**5. Empower your team members to perform their job.** Provide your team members with the tools, information, direction and support they need to get the job done. Reward and recognize positive performance, and provide ongoing coaching to correct and improve performance.

**6. Provide an open forum for two-way communication.** Create and maintain an environment of trust and open communication by encouraging your team members to share feedback, make recommendations for improvement, etc. If you really want to know how your department is doing, or how your customers feel about your company, simply ask your employees.

**7. Regularly validate your performance measurements.** Managers often get comfortable with the status quo. As a result, they fail to challenge current performance measurements to ensure their goals and metrics are properly aligned with the corporate strategy. □

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### Today's Headlines

There are two stories behind the headlines that greet us every day. One is the back story. And I don't mean what occurred last week but what has guided the story for a long time, years, centuries or even millennia. But an equally intriguing story is the forward story - what today's news tells us about tomorrow's world.

The news is a thin slice of the total story, like one section of a CAT scan or a single page from a very long book. Each headline reveals a tiny piece of that much larger story. To illustrate let us look at a couple of headlines of today's (6/18/09) New York Times and think about both the back story and the forward story.

The lead story is "Protesters Defy Iranian Efforts to Cloak Unrest." Iranian history of the last few decades includes the American intervention to elevate the Shah, with the consequent creation of a dictatorship, followed by revolution and Islamification of the country.

If we expand the story it is underpinned by the difficult and gradual march toward greater freedom throughout the world. We can trace that thread of the story back to the American Revolution, the Magna Charta, or any of a number of other awakenings. Indeed the full story goes back to even earlier days, more that 2500 years ago, to the Old Persian Empire, then the largest the world had ever seen. Every school child (I assume) knows of the mighty armies raised by Darius the Great and Xerxes the Great and how they attempted to defeat the rival Grecian states. They failed and that has made a huge difference to the future course of our histories. Western ideals of democracy came through the Greeks; and it is these ideals which are at work in today's Iran.

The forward story is the rise of the internet, communications and "social media" that helped inform the rest of the world. It seems clear that any government that wishes to oppress its people must control this media. But control also removes the benefits. Regimes that quash public dissent also ultimately relegate themselves to a reduced role in the world; just as removing opportunity for women reduces a country's human

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## Avoid Disaster

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without delay. Some consultants try to make adjustments on their own to avoid admitting a mistake. That usually just makes the situation worse.

The bad news about a project will not improve with age, so get to your client as soon as you suspect a problem. Most importantly, when you have to be the bearer of bad news, always be ready to present two assurances: (1) you know the

capital by half. Is that the full lesson that we might draw? I think not.

A second headline proclaims "A Financial Overhaul Plan but only a Hint of Roosevelt." Here we see the rise in power of not just the financial institutions, but also global corporate enterprises. A significant and growing portion of the world's economy is controlled by the S&P 500 corporations and their international cousins. The threat is, if it is a threat, that this commercial power will continue, will grow more and more and we will be faced with many additional iterations of companies that are "Too Big to Fail." What this means to democracy and the power of the people remains to be seen. You may have other views, but I consider this growth of power of these giant companies - non-government governments, if you will, - to be a great threat to our way of life.

We the computer elite know our role in this. As we apply ever greater processing power to an increasing range of products we enable managements who create those products. Some of these products may be without appropriate safeguards. Then the use of the tremendous power of computation can drive a financial system to its knees. Or, if not that, increase the importance, control and power of large commercial entities (or governments or religions) far beyond that which they should have.

The tapestry of history contains many threads. Behind every story may be many centuries of related stories. But today's stories herald the future, too. Those in the computing trades control that future as surely as today's armies. Will that forward story be delightful or grim? I won't suggest that any of us - or all of us - can control that arc of history, but we should think hard about it. □

*Opinions expressed in this column are the author's and do not necessarily reflect those of the ICCA or its members.*

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solution to the problem, and (2) proof that it won't happen again in the future. □

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# When to Trust Your Gut Feelings

by Glen R. Golish, LUTCF, CSA

Gut feelings don't originate in the intestines but in the right side of the brain. That is the brain's non-dominant sector for right-handed people, who constitute 90% of the population.

The brain's right side accepts incoming information and matches it against its store of previous experiences. These memories are recorded in the brain like videotapes. The matching process is instantaneous, taking only one tenth of a second. Suddenly, you're thinking: I've seen this before. Or: I know how this works. Or: I don't really like this person.



They are called gut feelings because that portion of the brain has the power to extrapolate a complete picture from a small amount of data. It is also highly visual and has strong links to the sources of emotion.

As a result, when the brain's right side starts playing those videotapes of previous experiences, even tiny pieces of them, you receive clear visual information enhanced by emotional reactions. Often these pictures register in your gut.

As an example: A seemingly innocent situation may inexplicably produce a gut-clenching feeling of fear. This means that the situation was quickly analyzed by the brain's right side, related to previous experiences, and judged to be highly dangerous. The rational portion of the brain, the left side, perceives no hint of danger. But the right hand system is flashing red alert. Run! Flee!

Not all gut feelings (intuition) take such dramatic form, but they are invariably produced in the same way. It is part of our instinctive system to provide a counterbalance, and complement, to our reason.

Where intuition fails is that although a gut feeling may be based on minimal input, it's conclusions feel like knowledge.

Intuition can command authority. Yet it may be dead wrong, diametrically opposed to reality. This leads many people to shrug off their gut feelings.

The dilemma is that we can't rationally prove that these gut level conclusions are correct. We have been trained to

select rational modes of thought. In fact, school children are punished for violating rules of reason. Given the opportunity, people prefer to distrust their intuition, particularly if there is time for analytical scrutiny.

Your gut feelings are a dependable barometer in dealing with people. For example: You experience negative feelings from a person you have just met. You're not sure why, but you don't trust them. Pay close attention to those gut feelings. You don't need proof that there is something wrong with them. Just the opposite, your system is demanding overwhelming evidence that there is something right about them.

Some other times you should pay close attention to your intuition: when your past record proves that listening to it pays off. Intuition can be honed by years of rational study in a particular field. These experiences have stocked the brain with a complete set of videotapes. Little can occur that you haven't recorded in one form or another. Intuition is a creative exploitation of the recorded material.

Some people have a great talent for gut feelings. They often find success in fields in which these gifts are appreciated. Such as sales, communications, the arts, etc. They seem to be able to sense the new products that will captivate the marketplace, the type of television shows audiences will watch, and the type of paintings and sculptures that will become the next rage.

If you and a friend are each working from a different set of information, yet you arrive at the same feeling, you're on target. That kind of confirmation is highly accurate.

Never ignore a gut feeling that is overwhelming or that signals a possible catastrophe. It doesn't happen often, but when it does, you should trust your instincts. Gut feelings are a form of life insurance. In time of emergency, don't allow your reason to overrule the primal power of gut tugging warning. □

*Glen R. Golish, LUTCF, CSA is President of Golish Financial Group. He specializes in advising seniors, business owners, and high net worth families with a Lifetime Economic Acceleration Process™. He has over 18 years of experience helping clients with the creation, preservation and most importantly, the distribution of wealth. Glen may be reached at 888-367-4536, glen@rgolish.com or visit www.rgolish.com.*

## Taming the Vigilante Consumer

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for a billionaire, they won't even notice. If we roll it out for millionaires, they expect it. If we roll out the red carpet for thousandaires, they appreciate it. And if we roll out the red carpet for hundredaires, they tell everybody they know." And you can take that to the bank. In the first six years since the bank opened, it grew from 16 to 180 employees and from \$6 million in assets to \$330 million.

### 3. Build relationships with your customers.

There are really only two types of customers: those who already know and love you and those who never heard of you. All businesses spend money trying to get new customers, but money spent keeping current customers does double duty. Pamper them, keep in touch with them,

acknowledge their needs. It's cheaper and more effective than getting new ones. Remember, an unhappy former customer will talk about you and cost you business. A happy current customer will talk about you and get you new business. People want to do business with people who appreciate them and look out for them.

No one ever lost customers by treating them with appreciation, consideration, and integrity. It is NOT your customer's job to know how you can serve them. It is our job to give them options and choices. □

*Patricia Fripp is an award-winning speaker on Customer Service and Sales. In-demand sales presentation trainer and executive speech coach. Kiplinger's Personal Finance says, "Patricia Fripp's speaking school is the sixth best way you can invest in your career." For more information, visit [www.fripp.com](http://www.fripp.com).*

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## Redefining Professional Service

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evolution of the field. It's time for practitioners' understanding of these functions to be expanded, upgraded and better integrated into their firms' larger strategic goals. For example, why should the term "marketing" only connote the limited activities of, let's say, "building awareness," or "sales support?" Shouldn't the term "marketing" be understood to also include targeting and segmentation? Pricing? Client loyalty? In many professional firms, marketing does not mean these latter terms, only the former.

New understandings of terms will foster practitioners' ability to grow the "right" revenues, gain meaningful market share, and optimally serve clients. Words really are the most critical point of entry to solving problems and making organizational progress.

### How Will a New Lexicon Happen?

As their firms encounter economic challenges - and in today's hypercompetitive business environment, these encounters are inevitable - professional service managers will inevitably accept their responsibility to reframe their people's understanding of expanded and more integrated functions of marketing and business development. Their primary responsibility will be at the level of the enterprise itself.

Their mandate will be to communicate the new meaning of "marketing" and "business development" for the firm. Just as I included a glossary of terms in the appendix of *The Integration Imperative*, I can imagine it won't be unheard of for professional firms to issue a new glossary for their

firm's commonly understood (and newly evolved) definitions. Once they've taken this step, and people begin to grasp these new meanings, managers can begin to reframe everyone's expectations for the performance of these functions.

In *The Integration Imperative*, the case study of Perkins+Will is an excellent example of a firm that embraced this cultural principle. The organization's executive managers created a new lexicon, and renamed the enterprise's go-to-market and client service orientation. For Perkins+Will, integration is an ongoing, almost holistic, commitment. And it is no accident that the firm's leaders recognized the importance of words as the catalyst toward its future growth.

Eventually, I predict, we will see a growing number of educational and professional credentialing institutions embrace their own new roles: teaching a new, broader and more integrated vision of what service marketing and business development can mean for the sector and the entire arena of professional services. The body of knowledge that is today so fragmented will finally begin to coalesce and mature. □

*Copyright © 2009. Suzanne Lowe is a highly regarded consultant, author and speaker on professional service marketing and management strategy. She is the author of *Marketplace Masters: How Professional Service Firms Compete to Win* (Praeger Publishers), and *The Integration Imperative: Erasing Marketing and Business Development Silos - Once and for All - in Professional Service Firms* (Professional Services Books). She also publishes a monthly newsletter, *The Marketplace Master™* and blog *The Expertise Marketplace™*. She can be reached by email at [slowe@expertisemarketing.com](mailto:slowe@expertisemarketing.com) or phone at 978-287-5080.*



## Book Review...

### *Make Your Contacts Count: Networking Know-How for Business and Career Success* Second Edition

Author: Anne Baber and Lynne Waymon

ISBN: 0-8144-7402-0; Cost \$14.95 U.S.; Paperback, 255 pages

As business owners, we all have the need to network for many different reasons. Many individuals feel natural walking into a room and making new contacts while some feel very uncomfortable in networking situations. We could all benefit from tips to take advantage of situations where you can make meaningful contacts. This book certainly points you in the right direction.

The authors have outlined a networking approach that any person, experienced networker or not, can follow with ease. Any situation can be a contact source and it is not as simple as just handing over a business card. Networking, if done correctly, can be a veritable art form. Ms. Baber and Ms. Waymon have created step-by-step guides to all aspects of this endeavor - The Contacts Count Networking System - making your efforts streamlined and strategic.

This system is divided into four sections: Survey your Skills and Mindset; Set Your Strategy; Sharpen Your Skills; and Select Your Settings. Within these sections you will determine your baseline networking knowledge, clearly outlining where your strengths and weaknesses lie; you will find concepts needed to create a networking strategy; you will be shown skills to make you comfortable within any potential situation and you will find the tools you need to be able to choose venues and maximize your efforts.

*Make Your Contacts Count* sheds light to common networking issues such as: tooting your own horn; biggest misconceptions; developing your own style; developing trust; setting your goals; networking etiquette; avoiding the usual turnoffs; listening; enhancing or repairing relationships. Most of all, answering the questions that are always present: Who are you, what do you do and what are we going to talk about? The book explains why most

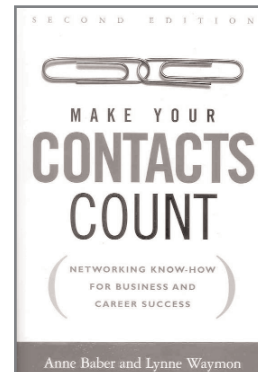
answers bomb, how to make the answer to these questions interesting and how to transform them to make them initiate conversations and spark genuine interest.

You will find many surveys, checklists and examples that will guide you from beginning to end during your networking endeavors. You will learn how to listen for your cue and make conversations flow. You will find how to exchange business cards effectively and make yourself memorable in a good way. You will learn how to make the most of memberships, contacts at work, conventions and even from working at home.

There is also a section that will help you jump-start your job hunt if you are currently looking for a job. The book outlines twenty-five tactics to find a job fast and how to apply The Contacts Count Networking System to your job hunt. During these uncertain times, this section can become very handy!

We all need the contacts but we also need to make our networking efforts count and not be a waste of time. If you read this book, I am sure you will find many tips that will take you to a higher level and your business will be better from it. As the authors say: "Networking is a journey, not a destination. Enjoy the trip."

*This book was reviewed by ICCA member Lizette Padron of Padron International Associates, LLC. You may visit ICCA's Recommended Reading section of the ICCA website for additional books to read.*



#### ***About the Authors:***

**Anne Baber** and **Lynne Waymon** are co-founders and principals of Contacts Count, a nationwide consulting and training firm specializing in career development and business and professional networking. For the past seventeen years, we've helped clients realize the many strategic applications for networking and have worked with them to increase their employee and member expertise. We also are currently expanding our cadre of outstanding Certified Contacts Count Presenters.

Networking is the pivotal professional capability for today's businessperson. We recognize the commitment and practice it takes to learn the skills in this book. We want to help you put more profit, purpose, and pleasure into all of your business and career relationships.

Baber and Waymon present keynotes, workshops, and train-the-trainer programs on FireProofing for corporate, government, university, and association audiences. Baber has a master's degree in Journalism from the University of Missouri-Columbia. She heads the Kansas City Contacts Count office. Waymon holds a master's degree in Education from Florida State University. She heads the Silver Spring, MD office.

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