EXCERPT FROM:

Best Practices in BUILDING YOUR PERSONAL NETWORK – for Professionals

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SECTION ONE: PERSONAL MARKETING STRATEGY

USE THIS SECTION TO DETERMINE YOUR PERSONAL MARKETING PROGRAM

Developed from the system proven most effective by the Best Business Generators in the professions, this section of the book first introduces the business development principles that they apply in their marketing efforts.

The remaining five chapters of this section give you specific step-by-step guidance in crafting your own personal marketing strategy. We begin with a method for focusing your program. Then we cover the four principal marketing activities for any professional: marketing to clients, building alliances, gaining referrals, and networking. The focus and activity discussed in those chapters should typically occupy 75% - 80% of your marketing effort.

Section 2 then elaborates on on the wide array of marketing activities you might need to implement, and tells you how to plan, execute, manage and follow-through on them. It also helps you with the remaining 20-25% of your efforts.

Put this system to work and see the results. Like the Best, you can build the mindset and skill set required to be successful.

HERE'S WHAT YOU WILL LEARN:

Chapter 4: Lessons from the Best Business Generators in the Professions

Chapter 5: How to Focus on Your Best Opportunities: Defining Your Personal Marketing Strategy

Chapter 6: The Art of Marketing to Your Existing Clients

Chapter 7: Building Powerful Marketing Alliances

Chapter 8: A Systematic Approach That Guarantees High Quality Referrals

Chapter 9: Developing Productive Relationships Through Effective Networking

In each chapter we will show you what to do, how to do it—and why.

- The time, place, and circumstances have to be in your favor to get your share of powerful introductions.
- Many professionals fail miserably at requesting and receiving introductions because:
  - They ask the wrong people.
  - They request generically.
  - They ask in the wrong environment.
  - They ask at the wrong time.
  - They don't know how to request.
- In requesting referrals, we suggest the following system:
  - Step 1: Get them to lunch.
  - Step 2: Thank them.
  - Step 3: Use the Plus/Minus Method.
  - Step 4: Be specific about what you want and get the introduction.
  - Step 5: Send a thank you note.
  - Step 6: Follow through on the introduction.
  - Step 7: Let them know what happened.
- If you don't have any clients or referral sources to ask, *ask everybody you know.* And if they didn't know someone the first time you asked, ask them again—someone may have dawned on them after you planted the seed.

CHAPTER 9

DEVELOPING PRODUCTIVE RELATIONSHIPS THROUGH EFFECTIVE NETWORKING

INTRODUCTION AND PURPOSE

BUSINESS IS RELATIONSHIPS.

That's the bad news. Chances are they didn't teach you much or anything at all about building lifetime referral or business relationships in school.

Quite the opposite, actually. The emphasis was on becoming technically excellent in your chosen field. The message was, and still is, implied: technical excellence will carry you far as a successful professional.

Today, in the twenty-first century, that message no longer applies *to the extent* it may once have. Perhaps there was a time when people sought out service providers simply by their reputations for being superior technicians, reputations which took a long time to build.

Don't get us wrong—we don't want to imply that technical expertise isn't important in being successful in your chosen field; it's just not enough to build the practice you want in today's ever more competitive world.

We've seen a lot of truly successful professional service firms over the last twenty years, and most were built in this way:

A core group of dedicated people set up POWERFUL referral networks that produced business through continual personal contact with other professionals.

Most "firm builders" or "rainmakers" learned how to do this network building by trial and error, were "naturals" at it, or were fortunate enough to be mentored (very few). As they became more successful, they hired "technicians" to do the work they sold.

Here's the good news. In this chapter, we're going to teach you how to do this, step-by-step. The *systematic approach* of the best business generators to practice building through productive networking is not taught anywhere else that we know of.

The purpose of this chapter is to help you get into the directed action of greatly increasing your number of important contacts in the business community and elsewhere. Increased contacts mean increased future business and referrals as you pursue the activity you can learn right here.

A LITTLE HISTORY

Back in the 1980s, the managing partner of one office of a large firm contacted us after he read one of our articles and heard us speak. Although it was a very successful office with many fine and profitable clients, he was worried.

The office had grown, prior to his relocation there, mostly through the expansion of the economy in his city and the growth of a select few clients. Until he arrived, there was very little or no personal marketing being done by anyone to sustain or ensure continued growth. They had grown, as so many firms do, mainly by accident.

He had been transferred from an office in another city that he had molded into a regional powerhouse, feared by his competitors. He built that office, and previous offices he had managed, through organizing a commanding group of alliances over a period of time. He was convinced, and his track record proved it, that a solid network of people was central to growing a practice. Otherwise, it almost couldn't be done, unless you were lucky (due to the economy's expansion, growth of clients, etc.).

After a year and a half in his new office, this managing partner felt that he knew more of the important referral sources in town than all of his partners and staff combined!

No matter how much he preached to them, no matter how obvious it was to him, he just couldn't get his people out into the community building the kind of networks he had developed over the years.

This wasn't an unusual situation in that respect: many "rainmakers" can tell you what to do; *hardly any can tell you systematically how to do it.*

So he brought us in to train his people how to methodically build their own groups of alliances over a period of time, in order to create a permanent influx of business opportunities.

How We Did It

To prepare this firm's program, we were commissioned to interview as many network builders that we could find in his firm (and outside as well) to determine exactly what they had done to build their referral systems.

Two months later, after interviewing dozens of professionals who had successfully built referral networks, we codified and systematized what we had learned and conducted the program for his firm.

Six weeks after the program we returned to find out what had happened. The program had worked. The managing partner couldn't believe it.

We had trained highly technical people in the behavior of network builders, in a way they could feel comfortable with. We had them pursuing only those activities that had the greatest likelihood of

success. And they had started to systematically build their own plentiful networks with new clients, referrals garnered—with a greatly increased activity level to show for it.

Since then we have conducted this program in firms all over the world. It has always worked—*but only when the participants were willing to work it.* It doesn't happen by itself…

NOW, IT'S YOUR TURN

Here it is for you—the systematic, methodical approach to building a lifetime referral network that produces a continuous stream of quality referrals. *This is not something you will do once and then forget about it.* As with anything regarding relationships, it is a living thing and must be nourished and nurtured over the long term.

You will be building word-of-mouth advertising through effective networking, just as the Best Business Generators in the professions do.

NETWORKING DEFINED

Most people have the wrong impression of what "networking" actually is and, therefore, don't want to have anything to do with it!

Here's what productive networking *IS NOT*:

- ***It's not being pushy***
- ***It's not taking advantage of your clients, relatives and friends***
- ***It's not always meeting strangers and going to social events***

Here's what PRODUCTIVE networking *IS*:

- ***It is finding people who are qualified to help you build your practice***
- ***It is creating mutually rewarding business and personal relationships***
- ***It is a "sorting-out process"***

In order to find people who can help you and then create relationships with them, you are going to have to sift through a lot of people. That's what the Best Business Generators in the profession did in starting and growing their own networks.

Just because you meet someone, doesn't mean you're going to develop a meaningful relationship with him or her. It's like courtship in that respect.

HOW THE BEST SYSTEMATICALLY BUILD THEIR NETWORKS

Here's the step by step process that we have systematized for you based only on how it's done by those who are best at building productive referral networks:

STEP #1: PICK YOUR TARGET CLIENTS

STEP #2: TAKE INVENTORY OF YOUR EXISTING CONTACTS

STEP #3: PRIORITIZE, RATE AND ANALYZE YOUR EXISTING CONTACTS FOR FURTHER EFFORT

STEP #4: ACTIVATE YOUR EXISTING CONTACTS

STEP #5: BUILD A CONTACT BASE OUTSIDE YOUR CIRCLE OF RELATIONSHIPS

Why does it work?

- ***It's based only upon "models of success"***

  No theory here; only what has been proven to produce results.

- ***It's an inside-out process***

  It puts you in control by starting with you and your immediate contacts

- ***It leverages and maximizes the strength of your current contact base***

  Where does it make sense to start this process of building business relationships? With total strangers? Or by utilizing the existing assets you already have?

  Sadly, most professionals in our business ignore their already existing advantages (whom they know; how those people can help them), and instead pursue relationships with total strangers first.

  We believe you should work "smart" rather than "hard."

- ***Lastly, it will focus the efforts you make outside your existing client base.***

Now let's review each of these steps in detail:

STEP #1: PICK YOUR TARGET CLIENTS

In Chapter 5, you already should have focused on your best marketing opportunities and defined your personal marketing strategy. Kindly take a look back at your notes to refresh your memory about your "clones" and other targets.

We only want to add a few words about "Image."

Since this course is on marketing your practice, and emphasizes personal marketing and human contact, we wanted to invest a little time on the subject of "image," that is, how you come across to others.

You are always marketing yourself, sending a message to others, whether you realize it or not. Your personal "image," the way you look to others, should be congruent with the types of clients you want to attract.

We're not going to dwell on this subject, because the concept of business casual seems to have taken hold at almost every firm. It appears people can dress pretty much anyway they please these days.

We don't know who your target clients are; they may be different from your current clients. We just suggest you take some time to consider your wardrobe, hair style, etc., and decide if it's appropriate to the type of client and referral source you want to attract.

If you have doubts about how to dress, or need help in making wardrobe decisions, we suggest an image consultant. Often these advisors will consider more than the clothes you wear, but also how you come across in personal situations. A good investment, one we're glad we made, and one that has contributed to our success in attracting clients in our target market.

STEP #2: TAKE INVENTORY OF YOUR EXISTING CONTACTS

The key to effective networking is to get the most out of the contacts you have and parlay your strengths into business. The listing you are about to make will give you an opportunity to take inventory of all the additional contacts (and sources of contacts) that you could tap so you can expand your business relationships.

As a way to facilitate your inventorying process, we have categorized several different types of networking contacts. Since a large list expands your options for follow-up, brainstorming will be useful to prompt even more additions to your inventory.

As you think through the categories and come up with additional contacts, write down the names in the left-hand column (Column A) of your copy of **Exhibit 9-1**. We'll leave the evaluation of these contacts for later (in Step #3), so you may concentrate on just expanding the list right now.

Keep in mind the kinds of target clients you determined in the focusing exercise (in Chapter 5) and those who can help you make further contacts. To help you brainstorm, use the following categories of contacts

Category A — People You Know Within Your Clients

The best place to start is with your existing client base, the people who know you and your work qualifications. Consider these questions:

- Who are your direct contacts in your best clients?

- Who else within the client company have you reported results to, worked on a project, or spent extensive meeting time with?
- Have you considered all those to whom you've sold additional services?

Category B — Other Professionals In Your Firm

- What kinds of contacts do you have in your office who work within your industry or specialization?
- Have you considered professionals with whom you've worked in the other functions and specialty areas of your firm?
- What people have you dined with, had extensive business conversations with, or done marketing with in the past year?

Category C — Professionals Outside Your Firm

- Have you included other professions (attorneys, bankers, consultants, stockbrokers, insurance agents, brokers—whichever may be the relevant non-competitive professional advisors to your target clients)?
- Which of these professionals have worked with you, either personally or within some client work?
- Are there any politicians or government leaders you know well?
- Have you thought about other types of professionals like financial planners, executive recruiters, and public relations executives? Many of them are "Concentrations of Power," those precious few people who know and influence many others. They are truly centers of influence who also love to help other people. All you need are a handful of these in your stable of referral sources and you will have a substantial and regular influx of new business.
- How about people you worked with at a previous firm? Might they have referral opportunities for you in non-competitive situations? Or for business they can't handle or want?

Category D — People You Know Personally or Socially

- Have you considered the people in you neighborhood who are in business or are professionals?
- What about people in business with whom you've had dinner with the past year, or had extensive business discussions?
- What people have you met more than once over the last year in a social or religious group?

- What school alumni have you been in touch with in the last few years (or should be in contact with)?
- Consider those you know from the health club, softball league or tennis lessons

Category E — People You Know from Business Associations

- What people have you had extensive business discussions with over the last year?
- How about those you've met more than once over the last year at an association or meeting?
- Have you considered leaders, board members, or association chairs with who you've been in touch over the last year?

Now that we've reviewed these different categories of people, take out your address book and complete the first column of your copy of **Exhibit 9-1** (on the next page). Feel free to expand on the Exhibit—you really should have many more than 18 names to post if you go through your address book. Consider ALL of your clients and referrals sources, personal and social contacts, people you've met at business associations, etc. Look at your Christmas or Holiday Card list.

THE COLLEGE ROOMMATE

One of our clients, a principal at a large firm, had NEVER CONSIDERED her college roommate (who was the vice president of a local company) as a potential referral contact. It wasn't her fault, really; nobody had ever introduced her to this process and her roommate hadn't thought of her either!

Within three months of our program she wrote to tell us that her roommate had introduced her to eleven prospective clients and she had secured six of those as clients for her firm.

Consider everyone as a possible contact at this stage. The elimination process is designed to sort out those who have helped you in the past and/or could help you in the future.

EXHIBIT 9-1 — PERSONAL RELATIONSHIP INVENTORY

(COLUMN A) **CONTACT NAME**	(COLUMN B) **HISTORICAL RATING**	(COLUMN C) **PROJECTED FUTURE RATING**	(COLUMN D) **WHY THEY WILL HELP**
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			

STEP #3: PRIORITIZE, RATE AND ANALYZE YOUR EXISTING CONTACTS FOR FURTHER CONTACT

A long list expands options for making a productive contact base. But the most effective way to take action is to focus initially where you have the best potential for making more contacts and where you already have strong relationships.

To do this, review the contact list you've just created and evaluate them on the criteria that follow.

STEP #3A: FIRST, RATE THEM ON THE HISTORICAL DIMENSION OF YOUR RELATIONSHIP

Will these contacts help you? Here you rate the QUALITY OF YOUR PRESENT PERSONAL RELATIONSHIP.

In the "Historical Rating" column, rate your contacts on how effectively they have provided you clients or referrals in the past. Use a 1, 2, 3, 4, or 0 rating scale:

1 = Referred you to opportunities and other contacts that resulted in business

2 = Referred you to opportunities and other contacts, but no business was developed

3 = A strong business relationship exists which led to at least 2 hours of discussion on mutual opportunities over the past year

4 = Not much of anything productive on your side has occurred

0 = Other

Now, go ahead and rate them historically in Column B of your Inventory.

STEP #3B: SECOND, RATE THESE CONTACTS ON HOW THEY CAN HELP YOU IN THE FUTURE

Consider these factors for your contacts in the Inventory:

- What is THEIR CONTACT MAKING POTENTIAL?
- How closely does their contact base FIT YOUR TARGET CRITERIA?
- How EXTENSIVE is their contact base?
- Can they help you make contact with "Concentrations of Power" whom they know?
- Might they help you make contact with other buyers within their company? With other referral sources in their office?
- Will they help you make contact with prospective buyers/influencers outside their company?

- Could they help you make contact with good referral sources?
- Might they introduce you into the right organizations and associations that you would want to join and become visible and active in?

Using an A, B, C rating scale, post your evaluations in Column C of the Inventory:

A = High potential for access to the right opportunities

B = Very good potential for access to the right opportunities

C = Contact needs to be qualified further to verify if there is strong potential

Post your "potential" ratings to Column C now.

STEP #3C: DIAGNOSE WHY YOU THINK THEY WILL HELP YOU

People do things for their reasons, not yours. Now is the time to consider what "aches, hurts or other emotional reasons" would make your contacts likely to help you:

- What problems do they have that you can help them address?
- Are they strongly interested in growing their practice/business, too?
- What can you offer them?
- Will they help you because you are close friends?
- Might they help you because you have helped them in the past?
- Do they like you and respect you?

In Column D of the Inventory, list the reasons why, at this time, you believe these people would help you *or* might not help you. It's possible that you may not know the answer to that question right now and will have to find out.

Post your answers now to Column D.

Note: because they can be so vital to your ability to network, indicate with an asterisk any of your contacts that you consider to be "Concentrations of Power."

CONGRATULATIONS! Stop right here!

You have just done an exercise that probably fewer than 5% of your competitors have ever completed (if that many).

Do you have any thoughts, feelings, or observations now that you have inventoried and quantified your existing contacts, for how they have helped you in the past and their potential for the future?

Perhaps you will agree with these observations we've heard when interviewing people who have completed the exercise: first, hardly anybody has ever catalogued their contacts like this before and, second, even fewer people have sat down and figured out EXACTLY HOW THEY'VE BEEN HELPED and what could be their POTENTIAL FOR THE FUTURE.

Approximately 80% of those completing this exercise have told us they had previously been INVESTING TIME, EFFORT AND ENERGY IN THE WRONG RELATIONSHIPS!

STEP #4: ACTIVATE YOUR EXISTING CONTACTS

Our next step is to utilize the information you have constructed and analyzed. It's time to activate your existing contacts so you can:

- Garner referrals and introductions to clients
- Secure introductions to more contacts (looking for Concentrations of Power)
- Be referred (hand-carried) into the right organizations (at the right level) where you can most effectively "network" and personally market your practice.

In this step *you will move from analysis to action* and begin developing word-of-mouth advertising. You will commence personally marketing your practice in a directed and thorough way based on models of success.

You already may be doing what you consider "networking" now—that's great. We suggest you make adjustments where necessary, if you see a need to improve your bottom line results from the effort you're investing.

You will be starting initially with people you already know, rather than networking with strangers. This is an inside-out process; we'll get to building a contact base outside your foundation of relationships in Step #5.

Where to start?

- Begin meeting first with people who have helped you the most in the past (1A's). Unless you are already having ongoing, regular and continuous dialogue, perhaps there is more you should be doing together
- Then move on to 2A's, etc.

It's important to concentrate on the "A" projected future rated people as they are most in a position to impact your network. Although you might feel more comfortable with your 3C's, you could be poorly spending valuable time and energy.

It may take you more than one or two meetings to have a "4A" assist you. And it may never happen because of lack of chemistry, lack of interest, etc. You want to invest where the relationships are already the best and more is possible, then move your way down in priority order.

There are three skill categories for you to use as you ACTIVATE your contacts most effectively: “Technical Skills,” “Personal Skills,” and “Time Investment.”

STEP #4A: TECHNICAL SKILLS FOR ACTIVATION

- Preparing for contact building meetings/lunches
- Creating an agenda for these meetings
- How to ask for “introductions”
- How to follow through and maintain control of the contact making relationship building process

STEP #4B: PERSONAL SKILLS FOR ACTIVATION

- Building “personal chemistry”
- Listening for and eliciting “aches, hurts, needs, wants or desires” and why they should help you
- Qualifying for “giving ability”

STEP #4C: TIME INVESTMENT AND ALLOCATION: MAKING NETWORKING THE NATURAL THING

- Building contact-making into your daily schedule
- How to make networking a habit

NETWORKING SKILLS THAT ACTIVATE CONTACTS

Now, we’ll examine *each skill set in detail*.

STEP #4A: TECHNICAL SKILLS FOR ACTIVATION

The Best Professional Business Generators execute certain activities “technically” that provide a foundation for effective personal marketing and contact making. Let’s take a close look at these “technical” skills.

- ***Technical Skill #1: Preparing for Contact Building Meetings/Lunches***

  Most people approach meetings with business contacts, referral sources and others who can help them *without thinking about what they want to achieve and how*. And usually, little is accomplished. The Best Business Generators prepare in order to succeed.

  Before you embark on any contact building meeting, sit down for at least five to ten minutes and write down the answers to these questions:

— How can I help this other person be more successful and effective?

— How can we advance our mutual interest by working together?

— What is this person’s likely “aches, hurts, needs, wants, desires and problems” with respect to their business, professional practice, or personal situation?

— Do we have mutual friends, business interests, and hobbies?

— What do I want to learn about their business?

— When’s the last time we worked together on a client or project?

— Do I have a specific piece of business I should be discussing with them?

— Do I owe them referrals or vice versa?

— What commitments do I want to secure from this meeting?

— What next steps should I aim for?

By answering these questions you prepare yourself to engage in a productive contact building meeting.

- ***Technical Skill #2: Creating an Agenda for These Meetings***

  There are several types of individuals you should be meeting with:

  — Other professionals with whom you could exchange referrals, looking to develop the right ones into allies. Perhaps you’ve met and exchanged referrals with some of these people before, or it could be a first meeting.

  — People who can help you by introducing you to people who can hire you, by acquainting you with new referral sources and by leading you into the right organizations.

  In this last category will fall your valued clients. In Chapter 8, we reviewed a systematic approach to requesting referrals. That approach can be translated into an agenda for additional contact-making assistance from your clients. This time, however, you may not only be looking for referrals. You may also be looking for additional referral sources, clubs or organizations you can be introduced into, and any other ways the client can help you build your referral network.

  Agenda for Meetings with Clients:

  Here’s a recap of that agenda, which you can modify for your needs in Step #4:

  1. Get them to lunch.
  2. Thank them for their business

3. Use the "Plus/Minus Method"
4. Be specific about what you want and get the introduction
5. Send a thank you note
6. Follow through on the introduction
7. Let the client know what happened

In the fourth item above, you may ask for the referral, or you may look for introductions to "Concentrations of Power," or a personal introduction to those select organizations where your target clients may hang out.

CASE STUDY: RECRUITING HELP

One client who participated in this program was the partner in charge of a practice area for the office of a large benefits consulting firm. A brilliant, but introverted and shy person, he had climbed the ranks based on his technical greatness, but could no longer rely on that alone to move ahead, or stay where he was.

He had no referral network to speak of.

Here's why the inventory and prioritization is so important: he had often supplied HR candidates for one of the most important and successful executive recruiting firms in town. His main contact at the recruiting firm was truly a "Concentration of Power," someone very well connected in the business community and a true builder of his firm.

Our client had been a good source of potential candidates and had a warm relationship. He was rated "4A" by our client for he had never received a referral or introduction from him.

After participating in our program, our client decided to pursue just the type of conversation we've suggested with you. He followed the above agenda to the letter.

In the #4 item above, his request was very specific: "Would he help him build his referral network? Would he be willing to mentor him and teach him what he had learned in building his own network?"

The executive recruiter was flattered–Of course he would help! People like helping other people, remember? And many successful people love teaching and mentoring; it's a way for them to be immortal, to pass along their great thoughts and success stories. Interestingly, within his own firm, with despite his reputation as the consummate rainmaker, not a single partner or associate had ever asked this man to mentor them.

Since then our client has been taken under the rainmaker's wing and been personally introduced to all of his important business contacts.

Agenda for Meetings with Referral Sources.

Next is an agenda for conducting meetings with referral sources about networking and contact building opportunities—it is somewhat different:

1. **Get them to lunch** for the same reasons we discussed in Chapter 8.
2. **Start your meeting with an "up-front" contract:** Ask them if they have anything they'd like to discuss at the meeting. Describe what you'd like to accomplish.
3. **Focus on the other person first:** Spend most of your time listening. Listen hard for their personal goals, motives, ambitions, problems, needs, wants and desires.
4. **Qualify them on how they can help you**: Do they see ways you can work together? What are their goals for building their practice? Who are they feeding off referrals to now? How is that relationship going? Are they delighted with the feedback they've received from their clients?
5. **Ask for their help—be specific**: What advice do they have for you? How can you go to market jointly? What specific introductions would you like?
6. **Test their reaction and seek commitment**: How do they want to proceed?
7. **Define mutual goals for the relationship**: How will they see this as a productive relationship? What objectives do you have?
8. **Agree on the commitments you make and the next steps you both will take:** When's the next time you should meet? Should you both review your address files to locate referral sources you should be introducing to each other? Exactly how do you proceed from here?

Keep in mind that "networking" is a SORTING OUT PROCESS.

There are going to be instances with referral sources where there is no place to go. In that case you have *succeeded* at effective networking, because you have sorted someone OUT of your potential network of referral sources in whom you'll invest your effort, energy and referrals at this time.

There are others who can help you but don't fall into the above categories of clients or referral sources. They could be friends, relatives, social contacts, etc. We do recommend sit-down meetings with them to discuss this particular subject, rather than doing it in passing or over the phone. This topic is an important one—you could tap into resources you didn't know you had, so make it a separate meeting from anything else.

Agenda for Meetings with Others

This next agenda has worked for many of our students and clients in those kinds of situations:

1. Get them to lunch.
2. Find our what's going on with them. Ask about family, friends, work, children, etc.
3. Thank them for meeting with you and tell them why you requested the luncheon. Inform them that you are building your network. Ask them to think of ways that you could help each other.
4. Describe exactly what you do and what you are looking for: contacts, introductions, referrals into the right organizations, etc.
5. Find out how you might help them.
6. Test their reaction and seek commitment. Do they want to proceed?
7. Find out how to move forward.

- ***Technical Skill #3: How to Ask for "Introductions"***

Back in Chapter 8, we discussed how to ask for "introductions" from clients and allies rather than mere "referrals."

Just as a quick refresher, here is our definition of an introduction: An "introduction" is an *intervention* on your behalf by the "contactor." For example, your cousin Bob *calls his friend* to find out if he would be willing to meet with you. Then, you follow through with the friend.

A "referral," according to our definition, is a name to call. For example, your cousin Bob says that you can give his friend Fred Morse a call.

If you'll remember, an introduction is a much more powerful marketing tool than a referral.

A vital key to your effective networking is to have the contactor introduce you. It will be necessary to get over your fear of asking people to make these introductions for you. One way to do that is to reflect now upon your inventory of contacts. Take a look at the last column on "Why they will help."

Also, in your meetings with these people, consider that you may go to your grave without knowing whether they would introduce you UNLESS YOU ASK. Do you want to do that?

Let's quickly review what a conversation about an introduction might sound like:

You: One of the reasons I wanted to get together with you, Bob, besides just seeing how you and Carol and Ted and Alice are, was to let you in on what's going on with me. It's hard to believe that Teddy is going to be attending college already!

You know, I've often admired the way you built your insurance business and the number of people you know. Until recently, I've never given much thought to building the same kind of network as you have because there always was enough business to go around for us.

I think we've seen a dramatic shift in the way business is being done; it has become much more competitive. Getting new clients for us is harder than ever, what with all the cutthroat competition that's out there. And, we're set up for some additional quality business without hurting our existing clients one bit.

I feel awkward asking this, but I was wondering if you'd be willing to introduce me to some or your referral sources and business contacts. I don't want to infringe on any of your relationships, but I sure would like to change the way I've been marketing my practice. Also, I know you've been heavily involved in certain clubs and organizations over the years; has it helped?

Bob: Sure, it's helped. Everyplace I've gone I've generated business. I often wondered how you did it because I never see you anywhere. I'd be happy to help.

You: Can you recommend any particular club, etc. where I should start?

Bob: I've always generated the most business from the local Pessimists Club. They're very selective about their membership—one has to be referred in."

You: Would that be possible?

Bob: Sure—you'd fit right in.

You: I really must get to know more bankers, venture capitalists, and private equity firms, what do you think?

Bob: Oh, they're vital to growing your business. You'd like Sally O'Malley—she's located right near your office."

You: Great. I'd love to talk to Sally. But she doesn't know me—I'd feel terribly uncomfortable calling on her, imposing myself right out of the blue. Would you introduce her to me by calling her up-front and asking her if she'd like to meet with me?

You get the idea. You would then ask for the personal introduction to the Pessimists Club, perhaps accompanying Bob to the next meeting.

- ***Technical Skill #4: How to Follow Through and Maintain Control of the Contact Making Relationship Building Process***

As many professionals tend not to be risk takers by nature, follow-through is often one area they neglect in building an effective network.

To keep the attention of your contacts, make sure to follow through immediately after meeting with them.

Plan on some form of communication at least monthly, whether it is in the form of a personal meeting, phone call, sending an article, etc. "Out of sight, out of mind" is an old and valid marketing rule. Do more than merely send them your newsletter. Invite your contacts to seminars, social events, etc. Make sure to maintain PERSONAL CONTACT with them.

Be sure to end your meetings with commitments to action. We run into so many professionals who have met with referral sources and others who could help them in the past, but had neglected to complete their meetings with decisions on how to proceed with the other person.

You always need to know, and they do as well, exactly what happens next. Will there be an introduction? Are you going back to your offices to search client databases for people to introduce to each other? Are you going to refer your referral source to this person? How? When? Don't leave things hanging in the air at the end of meetings, as tying together loose ends later on is much more time consuming and difficult.

Open-ended meetings result in ambiguity. And because the other person doesn't know what they are supposed to do next, they forget about you and your meeting immediately. Complete meetings by placing your next contact date on your calendars.

Set the following commitments to action at the end of meetings:

— The next time you will make contact

— When, specifically, introductions will be made

— How to proceed on joint marketing efforts

Database

You are going to need to maintain a detailed database to fully capture the value and control the "assets" in your personal networking inventory.

Yes, this is an additional time and paperwork burden; but the Best Professional Business Generators make it a practice to apply their organizational skills to their networking as well.

Here are the various types of information you need for a simplified but effective networking contact record keeping system. Contact management programs such as *Act* or *Microsoft Outlook* work quite well for this purpose.

— Name of Contact

— Title

— Company name

— Address

— Telephone and fax

— E-mail and Website address

— Source of Contact originally

— Notes on Company

— Notes on Contact: (History, networks, personal interests, trauma)

— Record of meetings or contacts with this individual

— Introductions received from this person

— Introductions given to this Contact

— When and how you thanked this individual

Being adept technically at building your network is invaluable to effectiveness and results. The Personal Skills are also critical.

STEP #4B: PERSONAL SKILLS FOR ACTIVATION

The Best Business Generators in the professions know that the "human" side of the networking equation is just as vital—and often more important than—the technical side of building a network.

- ***Personal Skill #1: Building "Personal Chemistry"***

Don't ever forget this marketing rule:

People help other people
they KNOW, LIKE, and TRUST.

You can be the most technically superior person in your state—but, if people don't like you and feel comfortable around you and feel good about helping you, they won't. This is sad but true for many of us who have placed our chips on the technical cards we hold in our hand.

Unfortunately, holding two "technical aces" probably won't win the game of business development poker if your other three cards are deuces or treys. So we'll invest some time in guiding you to improve your personal chemistry building skills.

Perhaps the single best way to building better chemistry—to develop more enjoyable and productive relationships, and to have people genuinely like you—is to be a better listener.

We know—you already know how to listen! Perhaps so, but do you listen well enough? Do you possess the skills to be the best listener you can be?

Listening is another skill generally not taught in schools. We have had so much success in teaching our clients and students how to be a more effective listener, that we often receive letters and phone calls about how they have applied this particular skill WITH IMMEDIATE RESULTS.

Employing "Active and Empathetic" Listening

We use the term "listening" in this context to embrace a certain connotation. "Listening" means to interact with someone in such a way that they get the feeling that you truly care about them and that you consider what they say is important.

People care much more about what THEY have to say than what YOU have to say. Unfortunately, they rarely find themselves in front of someone willing to listen without interruption. This need for being listened to is so vital that some people utilize the services of psychiatrists (and pay a small fortune doing so) just to have someone attend to their concerns. Does your best friend "listen" to you? Of course; otherwise they wouldn't be your best friend!

If you can tune up your listening skills, you will sell more work, get many more introductions, have better relationships with your clients or anyone else, and fully separate yourself from the competition.

From a control standpoint, listening is critical as well. Many people think that the talker controls the conversation. Not true: the talker *dominates.* The listener, or interviewer, *directs* the meeting. Watch "60 Minutes" some Sunday evening and you'll see what we mean.

At the end of this chapter, we cover in detail what we have found to be the 11 Keys to Active and Empathetic Listening.

It all adds up to aiming for an 80/20 ratio of listening to talking. In doing so, you will stand out from your competition and develop much stronger, more personal, relationships with people who can help you reach your business development goals.

- ***Personal Skill #2: Listening for and Eliciting Aches, Hurts, Needs, Wants or Desires—and Why They Should Help You***

People could be the greatest contacts, referral sources and introducers in the world, but unless there is a *reason* for helping you, they won't. And if they won't help, you can't waste your time investing in the relationship—you need to sort the wrong ones out.

So an important part of the network building process is finding those people who will help you because they have a reason to.

"Aches, hurts, needs, wants or desires" are all solid reasons for motivating people to work with you to build your practice. You need the skills to find these out, or you'll be wasting your time when you meet with contacts.

Here's how to find these reasons out:

— *Ask informational questions:*

If you ask "who, what, where, when, how and why" type questions, people will tell you many things you might not think possible.

People, in the right environmental setting, away from the distractions of work and the office, will talk and talk until you cut them off.

— *Listen and feel for emotions*

There's a real difference between having contacts relay "information" vs. "wants, needs, desires, problems, etc." People will help you for these emotional reasons.

"We refer business to a couple of people" is factual but doesn't tell you much.

But this, "We're catching a lot of flack because these people are ignoring our clients' needs and the clients are badgering us about it,"—this is emotional, and you definitely have somewhere to go with this person.

— *Elicit their goals*

Finding out what a referral source wants to happen in her practice is vital to finding out if she will be willing to help you (and vice versa).

If her goals are to build a more profitable practice, ensure her clients are extremely well taken care of, and build a closer relationship with other selected professionals, you may have real possibility in this relationship.

If her goals are to pull back, slow down, not rock the boat, not change anything, you may not have any place to go.

Be aware of emotional reasons for having someone help you in all of your conversations.

- ***Personal Skill #3: Qualifying the "Giving Ability"***

  You need to figure out in your conversations specifically how people can help you (and you help them). Do they have the kind of contacts you need? Is it mutual?

  Do you want to invest a lot of time with an a banker, for instance, who only handles companies with sales under $10 million? Perhaps if that's your target market or if they have referral sources you can be introduced to.

  Determine someone's giving ability in deciding who you want to be in your referral network.

STEP #4C: TIME INVESTMENT AND ALLOCATION: MAKING NETWORKING THE NATURAL THING

- ***Time Investment #1: Building Contact Making into Your Daily Schedule.***

  The following actions will help you build contacts on a daily basis:

  — Reach out to new people in committee meetings, client meetings—anyplace.

  — Talk to individuals at group presentations.

  — Ask clients and referral sources to include people in your meetings that you would like to meet

  — Get to know new people while doing client work

  — Leave your business card with tips, insert it with your paid bills

POWER CARDS

One of our clients took this idea and really ran with it. He started leaving his business card with every tip he gave. He sent his card with bills that he paid. Many of the same people received his card over and over again. HE BUILT THIS FORM OF NETWORKING INTO HIS DAILY ACTIVITIES.

As he put it, people need to know who you are, what you do and whether you want the business in order to give it to you! By handing out his card everywhere, he was accomplishing all three. And, as in advertising, one just needs to keep broadcasting repeatedly. Consider how often Peter Norton hit you with direct mail before you bought Norton Utilities.

In the first year of including his card with everything, he picked up six new clients, some of those good-sized revenue producers.

Another client of ours taught us this one. He takes an additional fifteen minutes at an association lunch, every month—habitually—and passes out his business card in a concentric circle around where he is. Sure he sees the same people over and over again—but he also catches them at different times of the buying cycle.

Marketing became for him a PERSONAL contact sport! Within a few years of starting this habit he had grown from being a sole practitioner to having six people working for him, just to handle the work.

  — Draw up a list of people you'd like to know and pro-actively ask your clients, referral sources, etc. to be introduced to them. *Carry this "Hit List: with you in your calendar.* In time you will find someone who knows one of your targets and will introduce you accordingly.

- ***Time Investment #2: How to Make Networking a Habit***

  Make networking a HABIT so you don't have to decide continually if and when you're going to do it.

  — Schedule contact making pro-actively, days and weeks in advance. So when you look at your calendar, you already have a commitment for making contact.

  — Set minimum daily/weekly requirements of one a day or three a week

  — Use breakfasts and lunches, those times of day you will usually not be working anyway

  — Start with people you find interesting and want to meet with the most—it'll make the process that much easier to start with

  — Set goals to give certain things up. Replace unproductive activities with ones that will help you build your network.

CHANGE OF PRIORITY

Another client of ours had been involved with a financing society for years, serving on many committees and making a name for himself as an expert on certain complex deals.

He had been networking with other area financing professionals, who unfortunately didn't refer a stick of business to him in the two years of his activity. All of those plaudits and displays of his knowledge and brilliance had not resulted in a dime's worth of new work because the other people were only looking out for their own opportunities.

So he gave up eighty percent of his involvement with the society, and invested that same amount of time being introduced to other networks, referral sources and people who could hire or refer him.

Net result was an expansion of his business by eighteen percent in his first year by redirecting his activities appropriately.

We're not saying you should give up work in your professional groups! Just make sure it is in alignment with what you want to accomplish, practice development-wise.

— Keep score. Set *goals* for the number of new people you will meet this month, contact meetings with existing and prospective referral sources, new organizations to check out. Reward yourself when you reach these goals.

STEP #5: BUILDING A CONTACT BASE OUTSIDE YOUR CIRCLE OF RELATIONSHIPS

This step is different from the first four steps, as you'll be concentrating outside your circle of existing relationships to parlay into more relationships. In this step you will meet with "strangers." We will discuss:

- Targeting the right organizations
- Strategies for working those organizations
- More ideas for networking success

STEP #5A: TARGETING THE RIGHT ORGANIZATIONS

Apply the following FIVE TESTS before you join an organization or decide if you are going to continue with the ones you're already in:

TEST #1: Are important prospects and referral sources active in the organization?

TEST #2: Are your current contacts active in it?

TEST #3: Do your interests match the organization?

TEST #4: Are there opportunities to showcase your abilities?

TEST #5: Is it NOT OVERRUN BY YOUR COMPETITORS?

Here are some specific ways to target the right organizations:

- Ask clients which organizations they like, and why. Request introductions to the Executive Director.
- Ask referral sources what they recommend. Request introductions into the group.
- Screen publications to see which organizations are covered and most active.

STEP #5B: STRATEGIES FOR WORKING THOSE ORGANIZATIONS

Your personal reputation in your community or niche will be built by those people you interact with in civic, business, or social organizations.

Since the most important form of marketing is personal, how you "perform" and interact with other people determine their impression of your abilities as a professional. Remember, they probably have no other point of reference.

In order to maximize your effectiveness in working organizations, follow these tactics:

- ***Go to the gold***

  Be involved with those organizations where you" find your best contacts and potential clients and referral sources.

  Use existing contacts to help you make more introductions at events and gatherings.

- ***Don't join everything***

  Be HEAVILY involved in only one or two organizations that best match your interests and goals.

  Many professionals shy away from the proper level of involvement, or involvement at all in organizations, because they think they have to try to be involved in everything. Not so. By limiting yourself to one or two of the best organizations, clubs, etc. for your purposes, you are freed up to enjoy the organizations more—and perform much better personal marketing.

- ***Maximize your visibility***

  Try not to be trapped in hidden roles. Go for the roles that offer greater visibility so you can connect with the right people in the situations that will best demonstrate your talents.

  Consider moving into high visibility committees such as the program committee, membership, and fund raising. Each offers you contact with many people and an opportunity to perform where it will be noticed.

  Look to become the president of the organization as that offers prominence and high visibility for your skills as a contributor and leader.

  Seek opportunities to fill gaps and go for those jobs that others don't want—and do your best to solve the problems no one's been able to in the past. Find out from the executive director how you can best serve her and the organization. It makes sense to be frank in a situation where you are going to undertake a situation that requires a lot of work. Executive directors understand that professionals do organizational work out of their sense of obligation to the community, but also to promote themselves. Set up-front contracts with her about publicity regarding your work, therefore, when undertaking challenging assignments .

- ***Undertake only those projects you can complete successfully and impressively***

  Perhaps this is obvious to you, but we have seen many circumstances where professionals don't give the same commitment to their organizational work as they do their client work. We've observed and heard of situations where some projects are late, they don't keep to their commitments, and their work is sloppy or even incorrect.

You must treat your organizational work as you would that of your best clients or prospective clients.

Although you're not getting paid in dollars, you will be paid in referrals and new clients if you absolutely put your best foot forward in everything you do. You are always marketing yourself. Those that know you, observe you and interact with you build your reputation.

THE WORST FOOT FORWARD AND THE BEST

One service provider we know undertook a survey project for one of his organizations about member satisfaction. A good idea, this project could put you in front of every important person in the organization for his or her input and feedback. That's not the way he saw it, however, nor performed it. Instead of using the precious personal contact provided by such a project, he assigned clerical people to do the project with little supervision and guidance.

When the project was complete, it was distributed to the other members on cheap copy paper, without a cover. There were typos in it and obvious mistakes. How did he look in the eyes of those he was trying to influence?

In another city one of our clients decided to do the same thing, except she looked at it as one of her most important marketing projects of the year. She told us that treated it as if she were being paid $150,000 for the project, BECAUSE THAT WAS THE NEW BUSINESS GOAL SHE WANTED OUT OF IT.

Smartly, she conducted most of the interviews herself by phone, and did some selectively in person—with those target clients and referral sources she specifically wanted to make contact with.

She did the project incrementally during a slower time of the year and produced a survey to the delight of everyone in the group. It was displayed with graphics and charts, showed trends, and was generated on her firm's finest paper and covers.

Her personal contacts, the product itself, the article it spawned in the society's publications and the positive personal publicity she generated—all resulted in five new clients to the tune of $243,000 in new business and seven referrals to contacts and clients outside the organization.

- ***Plan your contacts pro-actively***

  Before you attend meetings or events, decide ahead of time who you want to talk to or meet at the function. Have a plan of action to speak with a specific someone, to introduce yourself, make an appointment for lunch, or simply get to know better.

- ***Set goals for your organizations***

  Set a time frame during which you will give your best shot with an organization. If, after two years, you haven't generated a certain number of new clients, a specific number of referrals, etc., consider moving on to more fertile territory.

STEP #5C: MORE IDEAS FOR NETWORKING SUCCESS

- ***Avoid Drinking***

  Remember, you're networking to market yourself—this is business! Some people don't know their tolerance; we've all met people at networking events who have "had a few too many" to be sociable and to loosen up. We assume you don't drink at work, so be sharp and don't take the chance of making the wrong impression.

- ***Don't meet EVERYBODY***

  Strive to meet only one person at an event, and get to know that person well. You're there to establish relationships, not fill your dance card.

- ***Carry your Appointment Book Or PDA***

  Be sure to have your appointment book handy to set an appointment for lunch with someone that you find can benefit mutually from your association. Afraid to set appointments? Try this: "Can we get together to discuss this further?"

- ***Look to GIVE rather than receive***

  Stop looking to merely get as many business contacts as you possibly can, and start helping others with their marketing needs! You'll stand out from everyone else. Most people look at networking only as a way to help themselves—they are "takers." The best network builders are always looking to help others—they are "givers." It is this "giving" quality that attracts others to them.

  "Givers" attend networking activities, committee meetings, etc. as a vehicle for them to help their referral sources and clients. They know that what they give away will come back over and over again. And they use this "giving" excuse as a motivation to attend, because the best networkers aren't necessarily party people by nature. Many network because they see it as something they must do in order to maintain, grow and improve their practice and their business relationships

  Help your contacts be successful and they'll help you be successful.

- ***Always FOLLOW-UP***

  Always send a personal follow-up to those that you interact with. Social psychologists report that written communication is one of the best ways to enhance a relationship. People like to receive personal notes, especially since so few people take the time to write them.

  Timing is important—as with all forms of communication for positive reinforcement, the sooner your note is received, the greater its impact. Some of our clients keep note cards at home so they can write notes IMMEDIATELY AFTER AN EVENT, so it will arrive the next morning in the mail or at latest the following day.

Separate yourself from the competition: chances are they don't take the time or effort to write personal notes.

- ***Ask for INTRODUCTIONS***

  Don't stand there wishing to meet that important person over there—ask someone (like the executive director—it's their job) to introduce you.

- ***Take notes***

  Take notes about the other person on the back of their business card.

- ***Build your personal interests into your contact making strategy***

  Create a list of those activities that give you energy, make you enthusiastic, and that you would consider pursuing for business reasons as well as personal gratification.

TRUMPING THE COMPETITION

We remember one woman who participated in our networking training at a firm in the Northwest. She was one of the shyest, most quiet people we had ever met and was a self-described loner. However, she saw that it was imperative that she somehow build a referral network in order to stay with her firm and build up job security. We suggested she come up with a list of activities that she enjoyed in order to guide her in this process.

She loved to play Bridge and played at every opportunity she could with the same three friends for the previous eight years. Had she ever considered joining a bridge club as a way of getting to meet people? Her homework was to identify bridge clubs in the downtown area of her city as well as near where she lived.

Two weeks later she called us. She had conducted a very thorough search and couldn't find a single one! We suggested that there might be others, like her, who would care to play bridge on a regular basis beyond the same old group of players in their intimate circle. Why not start a bridge club as her way of getting to know people?

She was PUMPED. This was right up her alley! She loved bridge and was tired of playing with the same old players. She took out an ad in the downtown office newspaper weekly, in her suburban newspaper, and in her university alumni newsletter. She posted signs in the office buildings in the area. Within three weeks, she had started two bridge clubs, one downtown that met at lunch once a week and one out where she lived.

Now, who do you think plays bridge? Construction workers who want to get into a few beers between six packs? People on welfare? No—bridge is a sophisticated game that attracts a certain kind of "cultured" person. All of a sudden this meek, shy person had shown herself to be a leader and was regularly socializing with attorneys, bankers and people with money (aka prospective clients and referral sources).

Maybe that's why so many clients have been sold, and referral relationships nourished, on the proverbial golf links or hunting/fishing clubs. Contacts made by

people enjoying what they do—and possibly, therefore, more receptive to meeting and spending time with new people who share the same interest.

We're terrible golfers. In our own experience, we found that the best way to promote our businesses was through writing articles and speaking engagements, two activities we loved, enjoyed and were well received.

- ***Sit by strangers, not associates***

  At any event, make it your habit to sit with some people you don't know. You'd be amazed at how many opportunities to make new contact are lost because people sit with their cohorts or with the same "safe" buddies every time. If you want to have lunch or dinner with an important contact at the meeting, just make sure you are seated together at the table with the "strangers."

- ***Search out the lonely person***

  Ever see people standing by themselves at organizational events? How do you think they feel? Perhaps they are too afraid to walk up to someone they don't know; maybe they're new to the group. There's a good chance they won't come back if someone doesn't initiate contact with them—and they could be a potential client.

  The next time you see someone alone, walk up to him or her, introduce yourself and welcome them. Find out about them and their business. They'll be ever so grateful that you did.

- ***About name tags***

  Most people wear name tags on the wrong lapel. People read from left to right; similarly with a name tag. Place your name tag on your RIGHT lapel. Write in bold, easy to read letters: your name, your professional designation, your firm name and your organizational title.

- ***Look for opportunities to be UNIQUE***

ROCKING THE BOAT

One student shared what he had done after he adapted our training to his particular circumstances. He was stuck in the hidden role of church treasurer. He had joined this particular church years earlier for strong spiritual reasons, but also because its members contained some of the most influential people in the community.

For the last two years he had been on the board of directors with some of these important people and had received no business or referrals. Then he decided to be unique and present the financial results, as they had never been done before:

Instead of the usual biennial review of the financial statements, he decided to do it up as if the church was his best client.

His new live presentation, which he had publicized in the church news, was a big hit. Instead of hard copies he showed slides, his handouts featured analyses of the church's results compared with other religious organizations in the community and elsewhere, and his financials showed trends weighed against history and anticipated results.

The comments were so positive about his presentation that the board applauded when he was finished. Afterwards, five of the "movers and shakers" of the church asked to meet with him for lunch. Within three months of his first "unique" presentation, he had obtained three sizable new clients and eleven referrals.

- ***Regularly check the business section of your town's newspaper***

  Keep an eye open for your contacts when they receive a promotion or some publicity about something they have accomplished or done in the community. Send a congratulatory note immediately—you'd be surprised how few people do.

- ***Start your own networking group***

  Some professionals have found great success by starting their own select business alliances group.

  The idea is to have only one profession and business represented in the group. Then meet for breakfast or lunch once a month and trade ideas on how to grow your businesses, as well as trade referrals and introductions within members of the group.

  By starting your own organization, you can be selective about who you want to include in the group, perhaps referral sources you've not had too much contact with in the past.

  One client did this at a very early stage in his career. As a new VP in his late-twenties, he formed a group with alumni from his business school, including a corporate attorney, venture capitalist and HR consultant. Four years later the group had expanded into fourteen professionals and he had generated a quarter million in new business from scratch.

- ***Maintain a Referral ledger***

  Keep track of referrals received and given in a binder so you know at all times where you stand with your contacts and referral sources.

CONCLUSION

Networking effectively is one of the primary ways that the Best Business Generators have built their practices. Use your limited time effectively by following the system in this chapter to grow your business.

SUMMARY

- BUSINESS IS RELATIONSHIPS.
- Productive networking *IS NOT*:
  - — Being pushy.
  - — Taking advantage of your clients, relatives and friends.
  - — Meeting strangers and going to social events.
- PRODUCTIVE networking *IS*:
  - — Finding people who are qualified to help you build your practice
  - — Creating mutually rewarding business and personal relationships
  - — A "sorting-out process."
- You are always marketing yourself, sending a message to others, whether you realize it or not.
- Your personal "image," the way you look to others, should be congruent with the types of clients you want to attract.
- Utilize this step by step process to build your productive referral network, and begin to put the techniques and suggestions to work for you:
  - — Step #1: Pick Your Target Clients
  - — Step #2: Take Inventory of Your Existing Contacts
  - — Step #3: Prioritize, Rate and Analyze Your Existing Contacts for Further Effort
  - — Step #4: ACTIVATE Your Existing Contacts:
  - — Step #5: Build a Contact Base Outside Your Circle of Relationships

ADDENDUM: THE ELEVEN KEYS TO ACTIVE AND EMPATHETIC LISTENING

Here's how to become much better at the skill of "listening." Active listening is critical to the Personal Skill #1 discussed in this chapter, the skill of creating personal chemistry with a contact.

Key #1. Take WRITTEN NOTES

What does it say about someone who takes written notes during a meeting?

Doesn't it say that they are concerned, effective and organized? Won't the other person get the feeling that what they are saying is important (and that they, too, are important)?

Taking notes at a lunch meeting isn't easy—the food gets in the way, and it can feel awkward. We're not suggesting that you take volumes of notes; just make sure to write down the commitments, introductions, follow-through and other pertinent information on how you can help this person and vice versa.

Written notes also provide the evidence, details and history you need to refer to over the life of a productive relationship.

Written notes also say so much about you as a professional: that you are detail oriented, thorough, that you are going to follow up—those are all positive traits for someone professional.

Key #2. NEVER INTERRUPT the other person

People love to talk and talk. . . . .

Unfortunately, most people are in too much of a hurry to listen. Chances are that few others in the other person's life truly listen.

Never interrupt anyone in a meeting except in case of fire or nuclear attack. If the other person babbles on and strays off of the subject, you can always direct them back with a question and sneak it in when they take a breath.

How do you feel when you're interrupted?

Rainmakers often receive more introductions and sell more business than their competitors by simply listening more, and interrupting less, than the competition.

Key #3. Give verbal and visual SIGNALS

Too basic, you say? We've been to dozens of meetings observing professionals sitting blank-faced. You must let the contact know that they are being listened to, or they will stop talking.

Nod your head, say things like "I see" or "Uh-huh" to let the other person know you are in sync with their spoken thoughts.

Key #4. Pretend WHATEVER the contact is saying is IMPORTANT

Sometimes you have to *pretend* what other people are saying is important because you may have heard similar stories or the same concerns expressed before.

However, these are special issues to the contact and they will be disappointed if you don't hear them out.

Key #5. DON'T THINK!

Write down thoughts and questions that come to you. If you spend time thinking, you are not listening, and the other person knows it.

It is inevitable that thoughts and more questions come to you while listening. Great! That will be a good way to keep your the conversation going. Merely note these thoughts and questions on the paper where you are taking notes.

Key #6. Deal with IMPRECISE WORDS

Some referral sources make statements such as they "usually refer" Mary Contrary to clients or that they are "fairly pleased" with her work or that they are "considering" other resources. What do these words and statements mean?

In order to be a better listener (and a better business generator) find out immediately. Don't let inexact words or statements pass you by. Otherwise, you won't find out what the contact's true motives are or diagnose a situation correctly.

Don't be a mind reader! Say something like: "When you said that you were fairly pleased with how Mary takes care of your clients, what does that mean?" Or, "When you said that you 'usually' refer her in, does that mean that you would refer others in as well?" Or, "Can you expand or give me an example of a client's not getting the kind of service they wanted?"

Or, "When you said 'considering' does that mean you're ready to try someone new who will take better care of your clients?"

Afraid to pursue vague statements or words? The contact often doesn't realize what he or she has said. And we were all trained from childhood to redefine our assertions by our teachers in class.

In twenty years of asking people to expand upon what they have said, no one has ever refused to do so with us. If they ever did, it would be a good test of the lack of personal chemistry.

Key #7. Be CURIOUS

Remember the time before you started kindergarten? Well, how about before your children started school? Pre-school age children are so curious about everything. "Oh daddy, look at the truck!"

As we get older we tend to stop noticing things.

However, contacts, clients, referrals sources, and just about everybody, loves it when they find someone who has a genuine curiosity about them—their jobs, interests and lives. Too few others show much of an interest.

Be like that little child when you meet with the contact—let your curiosity take over. People will be much more apt to like you, be open and honest with you, and comfortable.

Key #8. LEAVE YOUR BROCHURES in the office

Some people expect the brochure to do the personal marketing and contact making for them. Yes, we've invested all of Chapter 17 in how to write brochures—but there's a time and a place for them.

Brochures provide an excellent *accompaniment* to a personal thank you note sent immediately after the meeting, and so provides one more exposure for you. They deliver a written description of your services and information about your firm that people might want to refer to.

But people don't refer professionals from brochures. People refer people. Don't detract in any way from "you" at your meetings.

Key #9. HOLD YOURSELF BACK

Many professionals think they are supposed to be a fountain of ideas and business solutions. As experts, we often feel the need to come up with answers to everything on the spot. Many offer solutions immediately when they hear concerns by referral sources, about how clients have been treated, for example, or about people they've worked with.

This is not how many of the best business generators in the profession create personal chemistry.

There is a time and place to offer solutions. It is not when you hear a "hot button;" it is later in the meeting after all of their needs, wants and desires are on the table. If you start answering concerns as you hear them, you will be doing far too much talking and interrupting the good flow that the contact is feeling.

Ever have conversations like this?

Referral source: "I referred an advisor to one of my best clients. And the guy didn't meet the project timetable. Now my client's calling me to complain about it."

You: "No problem! We get all of our work done on time and on budget."

Referral source: "That's what the last guy said."

Remember, what you say about yourself is your opinion and carries little weight. Wait until the appropriate time in the meeting to determine how and what concerns you will answer. MANY PEOPLE DON'T CARE MUCH ABOUT WHAT YOU HAVE TO SAY—IT'S THE LISTENING that builds your chemistry and credibility.

Key #10. Be YOURSELF

Some professionals adopt another persona when they meet in business settings. They start acting like they think they're "supposed to."

Let the contact meet the real you. Be open and vulnerable; be yourself. If they refer you and never meet the real "you" until afterwards, but don't like "you," then they'll probably refer someone else the next time anyway.

It's only by being open yourself, that you can build true personal chemistry and friendship.

Key #11. Don't answer UNASKED QUESTIONS

People don't buy firms, they buy individuals.

Don't answer a lot of unasked questions about your firm. We've seen so many unwitting professionals go into long dissertations about when their firm was founded, how many professionals they have, *blah, blah, blah*.

Contacts could care less. They care about getting their needs met. If you have to say something about your firm and your experience, make it short and sweet.

Again, aim for an 80/20 ratio of listening to talking. In doing so, you will stand out from your competition and develop much stronger, more personal, relationships with people who can help you reach your business development goals.

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BIOGRAPHIES

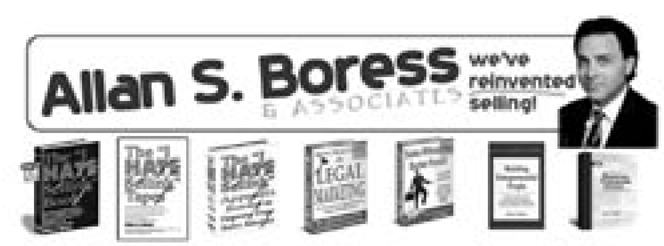
ALLAN S. BORESS, CPA, CFE

Allan S. Boress has been a Business Development Consultant to the professions since 1980.

Nobody we can find has trained more professionals in the arts of systematic selling, personal marketing, client retention, staff retention and motivation, as well as 21st Century Leadership—over 200,000—and worked with over 500 professional firms. He is acknowledged as the "Dean of Sales Consulting to the Professions."

An internationally-known speaker, trainer, and practice development expert, Mr. Boress was twice-named One of the **Top 100 People in the Accounting Profession** by *Accounting Today Magazine.* He is the author of eight published books, including *The I Hate Selling Book*, the only learning system ever custom-designed from scratch to teach professional service providers how to interview, qualify, present and close more sales opportunities. He is also the author of *Building Entrepreneurial People*, the only book that describes how to change the culture in a professional firm from business development reactivity to pro-activity (available at Amazon.com). *The American Institute of CPAs published his Mastering the Art of Marketing Professional Services: A Step-by-step Best Practices Guide.*

Allan's training is the only one of its kind based upon the Best Practices of The Top Business Producers across the professions. Over 1,000 multi-million dollar rainmakers have been interviewed, studied and analyzed for this book, and for all of his writings and training programs. Mr. Boress is available for firm retreats, keynote speaking engagements, and on-site presentations. He is an award winning speaker and instructor. He is acknowledged as creator of the "*Professional's Selling System*." He may be contacted at www.allanboress.com or allan@allanboress.com.



MICHAEL G. CUMMINGS

Mr. Cummings is the managing principal of SAGE. He has been a marketing strategy and business development consultant for over 20 years.

Early in his career, Michael was an instrumental member of the team that established the headquarters strategy and marketing function at Andersen Worldwide (Arthur Andersen & Accenture).

In this role, he defined information technology needs for key industries and functional areas; worked with senior partners to devise marketing plans and implement integrated marketing campaigns and developed strategy and marketing processes such as account management and market planning. He also helped to develop the initial large account management planning process and relationship management training programs.

Over the years, Michael has collaborated with Allan Boress to build the sales, marketing and relationship management skills of professionals of all sorts. Based on their collective experience in working with the top business generators within the professions—they have translated proven best practices into practical, reality based skill building systems and training programs. And he co-authored a new book with Allan in 2002—*Mastering the Art of Marketing Professional Services: A Step-by-step Best Practices Guide (AICPA).*

Prior to establishing SAGE, Michael was partner at Mercer Management Consulting—a leading business design consulting firm. At Mercer, he was responsible for new business development, managing client relationships and delivering business design engagements in the communications, information and industrial industries.

In this role, he was a leader of Mercer's top North American account over the past 6 years: IBM. Using his account planning, relationship management and selling skills developed over the years, Michael helped Mercer to create over 300 senior executive relationships and sustained base of business. He also led account teams aimed at expanding relationships with Motorola, Siemens and NCR.