

# ***HOW TO GENERATE LEADS AND GROW***



*A Practical, 'How-To' guide for B2B Businesses  
That Want To Compete and Win in ANY Marketplace!*

# *How To Generate Leads & Grow Your Business – Now!*

*By IBM's # 1 Marketer and Lead Generator.*

*Matthew Mann Minarik, Sr.*

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**Author's Note:**

Hello Friend,

This book is a practical, 'how to' guide for growth and lead generation for the business owner in the Business-to-Business world. There is very little about retail marketing and Twitter or Facebook (LinkedIn is a different matter, however).

Yes, you need a better web-site, and you need some social media, and you need some PPC and SEM (SEO). Yes, you need all those things, and they are all covered here, but this book is written with the small business owner in mind; under \$20 Million in revenue, and especially < \$5 Million who may not have the budget. Is that you?

Sometimes you just can't do all those marketing things that you need to do. But by doing just the top seven things listed in the Preface (and just by doing a Customer Marketing Program), you WILL grow by at least 20%! So get ready to grow!

All my best,

*Matt*

Matthew Mann Minarik, Sr.

**Dedication:**

To my beautiful wife, Margaret.

The love we have still keeps growing

and I am who I am because of her.

*(And to my six beautiful and good children*

*– you are the hope for America and the world.)*

### **Acknowledgements:**

My consulting business and my successes were not created in a vacuum. There was a lot of great input from many great sales and marketing leaders. Jeff Gessler is mentioned throughout the book, as well as others, but I also have to give strong acknowledgement to Dr. Peter Noel Murray who taught me many things. And there is the ‘father’ of sound direct marketing, Richard Viguerie, who needs to be acknowledged for his pioneering work.

My brothers Tom and (late) Jon also need to be acknowledged, but there was and is one solid teacher who took me from the geeky biochemist and Physician Assistant to being an expert in lead generation and growth and from which the basis of this whole book is written, and it is to my dear brother, James Edward Minarik – the most brilliant direct marketer ever; and a great American (Bronze Star and Purple Heart from Viet Nam). Thanks, Jim!

(One final acknowledgement; To Microsoft who provided me all the clip art from their clip art downloads! "Used with permission from Microsoft." and "This way to Microsoft.com".)

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## Preface:

Skip the rest of the book and just read the preface because there are seven things you need to do to be successful in your business, or your region, or your department (and you can even skip the rest of the book and get to the meat of it by reading Chapter 7 which gives you very specific means to get leads by next week). Here they are.

1. Make sure you have a product or service that fits a need; and make sure you know your business.
2. Differentiate yourself from EVERYONE and become the expert in your field.
3. Define and find your right target list and make it as narrow as you can – by industry, by size, and by person.
4. Have a great and singular offer.
5. Meet this target list face to face, and make sure you call and write to them often; like you would a lover.
6. Follow through 7 times to your prospect list.
7. Go back to your customers every month and ask for more business and ask for referrals.

Now that was simple. But there is more – much more.

You see, odds are great that you're lousy at lead generation. Almost everyone is lousy at it. It doesn't matter if you are IBM or a sole practitioner; generating leads is tough.

It takes work and many today are looking for silver bullets to generate leads instead of accountability and work. We're all lazy in this regard. Many sales people hide behind technology to generate leads for them. They send e-mails, they use automated, integrated electronic marketing, they use webinars, they use social media and whatever else other new electronic marketing means that comes out.

It's understandable because no one wants to do the work it takes to generate leads. This also explains the rise of 'Networking' groups. Everyone wants someone else to generate their leads for them. No one wants to make the calls. In short, few want to work for it. As well, many people want to 'hawk' their goods verses truly helping someone else. We hear too much of, "Buy this!" Instead of hearing 'How can I help you?'

Then there is the finger pointing. Sales people say that it is marketing's job to create leads. Oftentimes marketers think sales people should generate leads and that marketing's job is just to 'define markets', or do branding, create collateral (brochures) material, and schedule events and trade-shows. Anything but generate leads.

Salespeople are in tougher positions today to generate leads than ever before because most companies are very 'lean-

sized’, which means that fewer people are doing a lot more work and so when a salesman calls and the CIO looks at the caller ID and sees that they don’t know the person, they simply don’t answer it. As well, most companies when they are in the ‘awareness’ phase of buying, will now go to the web for their information verses a sales person. So sales people are constantly chasing an endless stream of voice-mails, e-mails, and networking events which produce a good CRM report or excel spreadsheet on leads, but no real results.

Today, the focus is on keeping every client a company has, and so the salesperson will devote a lot more time to their existing customers than to finding new ones. Multiply that by the fact that it takes 5 to 12 follow-up calls to close a deal and you have a lot of lost opportunity out there and the result of no quality or qualified lead generation.

This scenario is seen every day with business owners. That is why this book is critical for your success. This book goes through the elements of diverting that quagmire of inept leads to a real system of powerful lead generation. Enjoy and make millions and live a great life!



# Chapter 1

## The Energy It Takes

*Entropy – The input of energy stops entropy.*

When I was 19 years old, I worked at a men’s clothing store in a mall. It was an evening in February and business was slow. So the manager, Ray, said to me, “Matt let’s get some folding tables and put them out by the front door in the mall.”

“Ok”, I said, and we went and got the tables and set them up out front.

“Now, I want you to get a stack of pants, shirts, sweaters, and socks and put them on the tables.”

“Ok”, I said, and I went and got the clothes and put them on the tables.

People started watching me as they walked by.

“OK,” said Ray, “Now, I want you to start taking the pants and put them where the shirts are, then put the shirts where the sweaters are, and put the sweaters where the socks are, and then put the socks where the pants used to be.”

I looked at him with raised eyebrows that said quite loudly, ‘You want me to do what?’

“Just watch,” he assured me.

So I started moving all the clothes from one table to the other, and as I started to move them, people started to stop by. They wouldn’t even talk to me, but would start pulling the clothes right from my pile as I was moving them. More and more people just showed up! People started to buy – None of us had said a word!

Finally, as I was moving one of my piles, I walked past Ray and whispered, “What’s going on?”

Ray whispered back with this big grin on his face, ‘I have no idea, but every time I do this we always start doing a lot of business!’

Just because you picked up this book probably means that you have become focused on your business more than maybe you ever were focused before.

Energy begets energy. As long as you start ‘DOING’ something, positive things will happen. This book is filled with over 100 things to do to generate leads; just do 5 of them and you will be successful. Energy begets energy and inaction begets chaos.

-----  
What if you had over 100 **SOLID** leads in your hand right now? What would that mean to you?

Whatever it means to you, then that is what you will have after going through this book. You will have a step-by-step means of generating solid leads for your business. But that is only HALF the book. The other half of this book is about ‘Growing’ your business. And that means solid revenue coming in **RIGHT AWAY** – within weeks! This is what this book is about.

What’s more, this is not just a fish, but you will be able to repeat this methodology forever and grow any business you want to as large as you want because the methodology

presented here is based on solid principals over time, and not on new gimmicks or the newest iPhone App. Yes, those are in here, too, but they don't need to be.

If you are ready to jump-start your business and get it humming along, then let's get right into lead generation and growing your business.

Lead generation requires energy; let's talk about that.

If you think you can just pick up this book, copy a few concepts and then 'wham!', you'll have leads, then put the book down now. There is no silver bullet for work. In order for you to get leads and grow your business, you will need to have a fundamental, transformational change on how you are approaching your work. Sales and Lead Generation is a priority; not a side job. If you want success, then you **MUST** make this a priority. Everything else is just hope.

I received IBM's top award in marketing two years in a row from IBM's Software Group; 2001 and 2002.

I was able to generate hundreds of millions of dollars of opportunity for IBM's Business Partner in a matter of weeks! This book will tell you the process that was used, and how you can get great results for yourself, too. There wasn't any social media back in 2001 and 2002, but that's OK because the 'principals' of what were used to get the results are the same then as now. From this book, you will learn how to get

PHENOMINAL results in your own business-to-businessmarketing. In fact, from the time you are done reading this book, within 25 days, (if you do what is laid out here) you should be getting new leads and sales.

As we get into this, there is an overriding philosophy that should be brought up. Most who are reading this book are reading it because they want to improve their revenue; and that will happen. But this book is not about directly increasing revenue. The only way to do that is to cut costs.

Business Advisor, Steve Krisfalusy, says, ‘You can only control the things that you can control. Unless your new clients give you their checkbook you can’t control revenue. So all we can control are the ‘activities’ to get to the revenue.’

Too many people set goals like, ‘Let’s get 10 new clients this month’, or ‘Let’s pull in \$75,000 in new revenue (or \$7.5 Million) this quarter.’ You can’t control that. What you can control is how to get people to talk to you to see if there is a fit between what they need and what you can do for them, either in products or services, and then the rest will follow naturally.

## What is a Lead?

People call a ‘lead’ many different things, so let’s state up front what a lead is and is not.

It is **not** a list of potential customers. Some call those lists, ‘leads’, but they aren’t leads. They are just lists of names. The criteria to determine what is a lead, and more specifically, a QUALIFIED lead, is BANT. BANT stands for Budget, Authority, Need, and Timing.

Need is the 3<sup>rd</sup> letter of the acronym, BANT, but it’s the first thing you have to establish for a lead to be valid. What is the customer’s potential **need** for your product or service. If there is no need (and some say pain), then it is not a lead.

Second is budget. The prospect may have a need, but if they can’t pay for it, then it is useless as a lead. You must determine a person’s budget before you can qualify them as a lead. Make sure you understand what the costs are to carry the project or product forward, and then make sure they can afford it.

Third is Timing. Timing is discussed in more detail later on in this Chapter and in Chapter 11, but you have to move fast to make a sale happen. The longer the wait the lower are the odds of a sale ever happening.

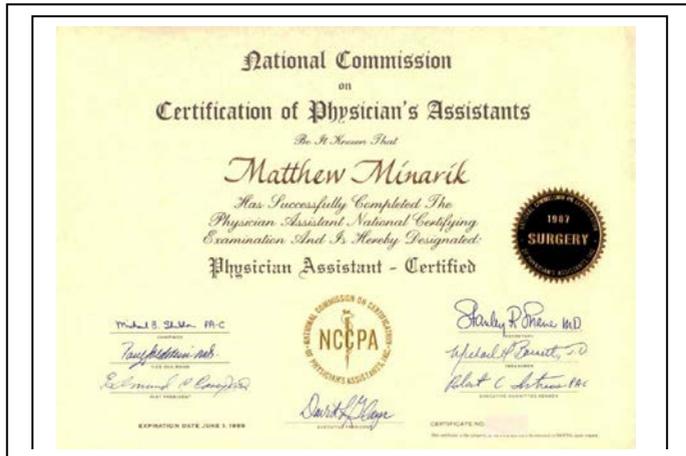
Last is Authority. You have to talk to the right person if you want to make the sale. Too many people waste time on

non-decision-makers. You may have to start with these people, but you'll never finish with them.

These criteria can be ranked by putting a scale to each of these four (B,A,N,T) from 1 to 5. A 1 is no potential and a 5 is hot. If all four are 5's (a perfect score of 20), then you have a hot 'A' lead - qualified. If you have 5 to 10, then that is a 'C' lead or a cold, unqualified lead. If you score 11 to 15, then that is a 'B' lead and worth pursuing.

This book will show you, very specifically, how to get plenty of 'A' quality leads.

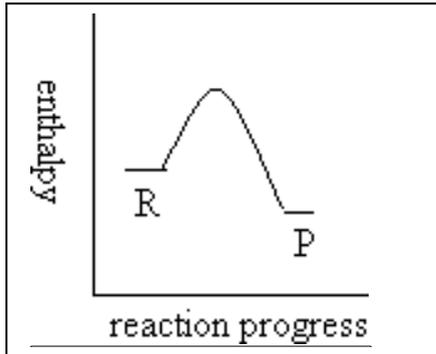
Let's back up a bit in time. I really don't want to talk about myself, but you need to understand a little history so that you can get a better picture of your potential. I received my degree in biochemistry from 'The Ohio State University' and that included a year of graduate school classes. From there I went and received a degree as a Physician Assistant and I specialized in neurosurgery – I did brain surgery (well, I 'assisted' in brain surgery)! Here is a copy of my National Certification I earned in 1986 (with honors for surgery).



Let me say this: What I did for IBM, I am going to teach you to do as well. It's not that hard; heck, it's not brain surgery, and if anyone would know, it would be me!

This first chapter is called Energy because it takes energy to make anything happen. In biochemistry there is an important molecule called a zymogen. A zymogen is defined as the inactive precursor to an active enzyme, and it relates to lead generation in how it 'creates energy' for a chemical reaction; which is what we need to generate leads: Energy of the sales reaction process.

Look at the diagram below;



This is a diagram of the ‘energy of activation’ required to make a chemical reaction ‘go’ on its own. In other words, one has to keep adding heat or pressure (energy) on the left side of the upward slope, or some other reactive-type chemicals, to help ‘fuel’ the chemical reaction until it breaches the ‘resistance’ point where the chemicals stop resisting each other (the top of the curve), and then ‘WHAM!’, the reaction just goes and you have a free release of energy! In sales and marketing terms, we call this: Leads!

There aren’t many sales people or CEOs that like ‘heat’ or ‘pressure’ from anyone. Truth is, when there are no sales, then there is a lot of heat and pressure on a lot of people to make that ‘energy of activation go.’ It’s a very uncomfortable position to be in. It would be nicer if there

was something that could ‘fuel’ the energy of leads other than a sales manager pounding the desk (or a banker or collection agency calling on the phone).

Companies must sell to be successful and oftentimes sales managers don’t have a zymogen or enzyme to fuel the leads and sales and so sales managers resort to ‘heat and pressure.’ In marketing, with the methodology shown here, we can create a marketing zymogen, which creates energy (leads) without heat or pressure!

If you go back to the basic energy equation, you will see the ‘uphill’ part on the left of the diagram. As stated before, that is the *input* of energy. For our argument, that is the beginning of the sales and marketing process – reading this book, for example. At some point, then, if done correctly, the process takes over and just starts creating energy; and in our case, it just starts ‘creating’ leads and eventually sales for you.

Up to now, odds are your sales and marketing for lead generation has been in a bit of a state of chaos and the sales manager, or you, or the owner, think that you need more excel spreadsheets and more desk pounding to make sales happen. In physics, chaos is roughly defined as molecular confusion and the result is entropy, which is the natural state of things to go to randomness. This is what most people’s sales and

marketing practices are all about. They have no clue where to begin or what to do. For some small businesses, they don't put much stock into sales and especially marketing and so they hire some recent college grad to 'make a brochure' or to 'make a few calls.' This is minimal energy and incorrect fuel and not nearly enough to get 'over the hill'.

You need to stop the chaos and entropy of your sales and that is done with energy. 'The input of energy stops entropy.' We want to create a 'zymogen' that creates energy to stop the entropy of your sales and marketing so that you can have a ton of leads, make a lot of sales, and some quick revenue.

That sentence bears repeating because it is so important: *“. . . we want to create a 'zymogen' that creates energy to stop the entropy of your sales and marketing so that you can have a ton of leads, make a lot of sales and some quick revenue.”***THAT** is what this book is all about. It's all about setting up an automatic 'chemical reaction' of marketing so that it flows on its own to give you leads and sales.

'*How to Generate Leads...*', the book, is all about the inactive marketing precursor to an active enzyme that creates leads and sales for you.

## Trust

### **In business, as in life, nothing happens without it.**

All that most sales and marketing campaigns are trying to do is Build Trust. Because people are agreeing to something before they know the outcome. At some time, they have to say, “OK, I believe what you are saying. Let’s try it.” To be successful, a company, and a salesperson, must begin at establishing Trust. It is the foundation of everything we do. Even Physics is based on Trust. For, physics is only physics because of the ‘laws of the universe’. Really, physicist are saying, ‘We believe that all the laws of the past are going to remain constant for the future’ – that is trust.

In order to construct a successful sales and marketing campaign, a company must build foundation of trust first; essentially, that is what branding is. A building without a good foundation will crumble and the same is true for a sales and marketing campaign here, too if it is not built on trust.

Since all sales is a transfer of trust, let’s begin with an understanding of what trust is in regard to business. Whenever someone buys anything from you, they trust that your product, or you, or your business, is going to perform in the way they paid for it to perform, or better. If it does, they

are happy and they continue to work with you, and if it doesn't then there are bad consequences.

Trust is a 5 pointed star, and the five points of Trust are:

1. Results
2. Competency
3. Insight
4. Relationships
5. Character



What is important to know about these five is that they are on a never ending ring of consistency. This diamond ring is a good analogy – the symbol in marriage is the diamond ring of engagement and the analogy even holds there where the ‘ring’ is the never ending circle.

Here are the five points spelled out.

**Results:** For businesses, what are the previous ‘results’ or ROI (Return on Investment) that you have demonstrated with a similar businesses? This is where you show the numbers such as, ‘With our software, company ABC reduced their inventory by 37%.’.

**Competency:** What certifications do you have? What have you done to ‘earn’ the credibility and competency side of the diamond? Are there any outside credible sources that verify you? Do you have 5 Microsoft Certifications? What White Papers or books have you written? Where have you spoken? Who has endorsed you? What awards have you or your business won? By themselves, these things may not mean too much, but they add to the picture (or star) of trust.

**Insight:** All customers and clients are not just buying your product or service for its performance, but for your insight into the area of their purchase. Insight is different than competency; in that, one can be good at one insight and be incompetent in execution (everyone’s got ideas but few know how to make things happen). On the other hand, I might be highly competent to be able to build a great computer, but I may have no insight into where the industry is going, and yet I may have a lot of insight into your specific business. Insight into your industry, their industry, and their business is very important in winning the trust of someone’s business.

**Relationships:** If I trust you and you recommend someone, then I trust that person. That is why referrals are so strong. Referrals are said to be the most efficient means of marketing

there is. Relationships based on ‘Associations’, Alumni groups, Business Clubs, etc., also work well.

**Character:** If you’re known as a liar, then no matter how good the Results are or the ROI is, or how competent you are, or how much insight you have, you won’t get the order. You’re too much of a risk. Good character is in direct inverse proportion to high risk. *‘A good name is better than great riches: and good favour is above silver and gold.’* (Proverbs 22:1 D-R). The more good character you have, the lower the risk. As stated earlier, Lowering Risk is one of the most important factors in today’s business world; therefore, the building up of trust is one of the most important marketing tools you can do. The big ad agencies have known this for years and that is why they are constantly telling their clients to spend more on Branding; if you have the money, then I agree 100%.

There is a phrase that goes around the IT circles, *“No one ever got fired for hiring IBM.”* What that means is that if an IT project goes wrong and the CIO wants to find a scapegoat, say in the IT Director, and the CIO starts to question him on his decisions regarding the project, then the IT Director would just say, *“Hey, I hired IBM, you can’t blame me for that? I mean, if I hired Joe’s IT shop and it went wrong, you would*

*have every right to fire me. But I hired the best, so something else must be the reason for the project failure.” That ‘branding’ mentality is where you want to get to with your business. “Hey, I hired ABC Company because they were known as the company with the highest character in the business, and so even if something goes wrong, they will make it right.” No risk.*



## Chapter 2

### **Five Elements Determine Success In All Sales and Marketing.**

If you ask marketing students at any University if they have ever been taught the five elements that determine success in all sales and marketing, odds are over 98% that you will not find one person who has been taught the five elements. Yet, these 5 are THE CRITICAL ELEMENTS to success in sales and marketing.

What the students will most often say when asked will be some variation of the four P's: Product, Price, Place, and Promotion. Small businesses who run successful sales and marketing promotions and campaigns almost never use the 4 P's. We never used them at IBM or for the successful business partners and we generated hundreds of millions of dollars of opportunity for our business partners.

For Business-to-Business sales and marketing, here are the 5 critical elements to determine success.



Figure 2.1 Five things determine success in all sales and marketing.

# 1 – **The List**, or the target audience (your prospective clients) is the most important element and accounts for up to 75% of the success of the campaign or sales effort. After all,

if you are selling IBM Servers we don't want to go after high school girls cruising the malls at 4 p.m. We also don't want grandmas who are looking for someone to clean their gutters.

We want IT Directors and CIOs who have networking and consolidation issues of companies that are of a certain size. If we don't reach them, then nothing else matters! Things like price or expertise or anything else you have come after that. It doesn't matter what you place, price, or promote. If the four P's are valid, then they need to be updated to the 5 P's with the new P being 'Person' – and make that #1. The right person is the # 1 critical factor in your success or failure.

When campaigns fail, over 85% of the reason for the failed campaign is because the list was bad. Many marketing people spend the least amount of time in this area and this is where they should be spending the most amount of time. Sales people understand this and they will often work the list very hard. Too many marketers or project managers will simply say, 'We went and downloaded a list.' That's it! It took 20 minutes and they are betting their multi-million dollar business on this simple endeavor. Because the list is the most important factor, it should take a long, long time to make sure it is RIGHT. This will be covered in great detail later on.

**#2 – The second most important element is the offer.**

The offer is simply defined as what the person on the list has to give for what they get. Period. The offer accounts for ‘up to’ 50% of the success of the campaign. If you’re good in math, you will see that this is only the second of 5 elements of success and we are over 100% (75% plus 50% = 125%). This is because these factors are ‘up to’. The offer may only be worth 30% of the success and the list may not be quite worth 75% (if we are advertising on the radio for McDonalds, then the list selection is less impactful). For Business-to-Business, and specialty or niche retail products, that 75% is right at the top. The offer, ironically, is what we will talk about the least amount in this book even though it is worth up to 50% of the success of the campaign. We will discuss offers later on. Which is better; offering 20% off or a dollar amount? Is there an advantage to offering two things at once? Does \$5 off work better than \$2 off? We will discuss these things in Chapter 8.

**# 3 – The Creative** is the third most important element in determining success for sales and marketing campaigns. The creative is defined as ‘the vehicle that takes the offer to the audience.’ Most people spend the most amount of time in this area. It’s fun. Most marketers want to be known as a

‘creative genius.’ The reality is that the creative is only worth ‘up to’ 20% of the success of a campaign! That’s it! Yet people will spend weeks on a flyer or brochure and months on a web site or other piece of the creative.

Ad agencies hate this fact and will often suppress it from their clients because they sell creativity by the pound! ‘We won all these awards for our creative interpretation of your product!’ Did it sell any product?

Understand, though, there are right things to do and wrong things to do in the creative, and if you do the right things, then you will see a 100% increase in response! It has been shown that when one element of the creative was changed, the response went from a 2% response to a 4% response! So please understand that the creative is very important, but understand that one should spend the least amount of time on it. The number just don’t justify a lot of time in this area.

Examples of the creative are: radio, direct mail, social media, telemarketing, trade shows, QR Codes, text messaging, billboards, sales people, e-mail, and on and on. It is all those things. Before you pick your creative, you **MUST** pick the audience and the offer first. You must do your marketing in priority.

To be successful, you must ‘construct a campaign’ verses ‘throwing something against the wall’. The analogy to constructing a good sales and marketing campaign that gets results is that of building a house.

The list is the foundation, the offer is the walls and the roof, and the creative is the paint and decorations on the house. You don’t paint before the walls are up, do you? And you don’t put up the roof and walls before the foundation is built, either. We will get into this in more detail in Chapter 9. The creative is fun and many enjoy putting a lot of time into it, but don’t spend your hard earned dollars too much on the creative; focus on who is actually going to buy your product or service.

**# 4 – The Fourth most important element floats! It’s Timing.** Timing can be more or less important than either the Creative or the Offer, but it is NEVER more important than the list. Timing is critical during budget allocation. If you meet with someone when they are making up your budgets and you get on their schedule, then timing becomes very important. If you meet them at the very end of their budget and they have extra money and they need to get rid of it, then the offer means little and the creative means less. However, you still have to get to the right person and so the list is still

the most important element. There are other timing issues, too, and it's not just in relation to budgets or seasons, it also is determinant upon the day in the month, the day in the week and the hour in the day. These will be covered, in detail, in Chapter 11.

**# 5 – Follow-through.** This is NOT the fifth most important critical issue. This is a binary equation; it's either on or off. You either follow-through or you don't. This is rated equal to the List in terms of importance. The top! It's that important. For years, follow-through wasn't one of the critical components for success...until one day. Let me relate to you what happened.

...I was the Central Region Marketing Manager for IBM's Software Business Partners. My job was to cover the partners in 15 states and help them with their marketing. I had this one partner in Columbus who was willing to try some ideas I had on delivering business. So I devised a campaign for them, and sent it off to a fulfillment agency to do the campaign – it was a direct mail campaign. Then I had to take off to see other partners in Chicago and Milwaukee and I said, I told him I would call in a few days to see how the response was. Well, as mentioned, about 5 days later I called him and he was ecstatic, "Matt we got a 27% response! We have

dozens of leads here.” (I will show you this exact campaign later on.)

“Great,” I said. “I’ll see you in two weeks.” And I thought nothing more of it.

Two weeks later I was making my way south from Cleveland and I stopped in to see him and I said, “Phil, how is it going?” He was excited to see me and he had a pile of leads on his desk and he said, ‘Look at all these!’.

“Wonderful. So how many appointments have you gotten from these and are you close to closing any deals?”

“Oh. Well, I haven’t called on any of them yet, but we’re getting around to it.” Well, my internal reaction was not the best and I quietly sat there for a minute to calm down and then I realized it was my fault.

“Phil,” I said. “Drop what you are doing and call everyone who responded right now. And if you don’t know what to say, then just say, ‘thanks for responding,’ and then hang up. But call them all right now.”

Here’s the deal, if you don’t follow up on a lead IMMEDIATELY it has a negative exponential decreasing value! In Chapter 12 you will get statistics to back this up, but I realized that I have to do a ‘Stephen Covey’ with all my campaigns, ‘Begin with the end in mind.’ What that means is

that now, before I design any campaign I start with ‘The Follow-Through.’

“OK, let’s say we get 100 leads, how are we going to follow up with them within 24 hours? Let’s put that process into place right now.” And even when we do that, the follow-through process still drags badly. Everyone is too busy. Suffice it to say, almost everyone sucks at follow-through.

Understand this; campaigns are ONLY successful when everyone has bought into it:

- Sales
- Marketing
- Sr. Management
- Admin
- Operations

If any one of these five divisions of the business is not bought into the campaign and the follow-through process, then the odds of the campaign being successful are very slim.

Experience from many business owners show that the best way to deal with follow-up is with a workable CRM (Customer Relationship Management) system. Those who have workable CRM systems achieve their goals and those who don’t have a workable, if any CRM, system flounder. It seems that businesses who cross over the threshold from \$5

Million in sales to \$10 Million on up, all have a good CRM system, but those who don't have a good, workable CRM system stay at the lower levels. You can't grow without a good, workable CRM system.

There are many good ones out there and what is most important here is the word, 'workable'. You have to find a CRM system that works for you. From ones that cost over \$1,000 a month to free ones, each can work as long as you work with it. A business must be COMMITTED to working it. Almost all salespeople are going to complain about the system and about putting in the data. They almost always do. That's tough, and that's too bad. You have to have a good, workable CRM system if you want to go grow and the owner and management team MUST be committed to it every day. Even if you have to hire a data entry person to put in the leads in order 'to make the CRM system work

Thus the five parts of campaign to determine success are simply: List, Offer, Creative, Timing, and Follow-through. These five criteria are the only five that matter in making sales from a marketing campaign.



## Chapter 3

### All Kinds of Marketing

Let's be clear here of what this book is about: Sales and growth for the small business owner or VP of sales and marketing for a B2B company. It is about Business-to-Business marketing that will get you leads for you to close to a sale!

There are four kinds of marketing that will be covered here that are important to small business owners.

- a. Brand marketing
- b. Industry marketing
- c. Competitive marketing

d. Direct marketing

Of course there are some out there who are musing, “What about web marketing and Social Media?” Understood, but that will be put under Direct Marketing as it’s really a reverse form of direct marketing where the list comes to you verses you going to the list. And there are other, important, forms of marketing out there, too, but they aren’t so important to the business owner or the VP of sales and so we will ignore them.

Let’s get back to the kinds of marketing there are. As mentioned before, there are 4 kinds of marketing:

- a. Brand marketing
- b. Industry marketing
- c. Competitive marketing
- d. Direct marketing

What is kind of funny is that ‘Lead Generation’ isn’t listed as a form of marketing. As you saw above, however, there are up to 38 ways to generate leads and they will come from all those four means of marketing mentioned here. So let’s take just a minute to go through the four kinds of marketing, now (I promise this won’t take long, and we will get into lead generation so that you can become a millionaire in just a minute).

## **Brand Marketing:**

Brand Marketing is very important, but there are a lot of direct marketers who look at Brand Marketing like an engineer regards a sales person – with a low regard for their success. You see, all marketing helps all other marketing. In other words, the 50¢ coupon for Tide that one gets in an e-mail, or whichever of the 29 ways, works because of the Brand Advertising behind it. Whether you know it or not, everyone does Brand Marketing. Your business, regardless of size has a brand. In the end, in the bottom-line very end, your product or service will do one thing for your clients; it will protect their Brand. To CEO's of larger companies, this is everything.

IBM business partners were encouraged to use the IBM Brand as it is the #2 most recognized logo in the world – USE IT! According to brand consultant Interbrand, the top 10 most valuable logos in 2010 in the world are:

<b>The Top 10</b>	(value in millions)
1. Coca-Cola	\$70,452
2. IBM	\$64,727
3. Microsoft	\$60,895
4. Google	\$43,557
5. GE	\$42,808
6. McDonald's	\$33,578

7. Intel	\$32,015
8. Nokia	\$29,495
9. Disney	\$28,731
10 HP	\$26,767

Brand Marketing does one thing very well; it builds trust. The problem with Brand marketing is that it usually takes several million dollars to get the message across to everyone of how trustworthy and fiscally responsible you are. The other problem is that it almost never generates any leads for you. If you are reading this book, you probably don't have several million to invest in Brand advertising. So use the tens of millions of dollars that IBM spends on brand advertising, or whomever you are aligned with, and take advantage of it, but that is only good if you are in an alliance or reseller relationship with them. If you don't have an IBM as a business partner, then don't worry too much about it. The important thing to realize is that 99% of businesses today are very successful without doing any Brand marketing – and you can be one of them. However, every business, including yours, has a Brand. Branding and Positioning are similar, but Positioning is that which can be defined as where something 'parks' in your brain when the name is mentioned.

For example, in regards to positioning, Morton's and McDonalds park in two different parts of your brain, and for obvious reasons. If you were asked where you want to eat, Morton's or McDonald's, then you would think about the time and money issues. That's positioning. You think of both of them in the context of fulfilling your own needs of eating beef. Now, if you are asked to be able to recognize the brand of Morton's and McDonalds – you would say yes. Yet, internally, your mind would unconsciously be thinking more globally as to the overall quality and consistency of the product.

Your company has a 'Brand' and a 'Position' in everyone's brain. Positioning is covered later on, but suffice it to say that you need to sit down and write down 'What do I want people to think of when they hear my company's name?' Branding is how trust is conveyed, and Positioning is where a company 'parks' in one's brain when they hear it mentioned.

Brand marketing has become increasingly important over the years as the stability and ethics of many companies are being questioned like never before. For this reason, brand marketing has become near critical for all companies to explore to some degree.

There are many good articles and books on Brand marketing, and this short section will probably do more

injustice than good, but here are some things to keep in mind with brand marketing.

### **The 9 Things To Know About Brand Marketing:**

1. The Brand should be focused around one BIG idea.
2. People care more about the company behind the product than they do the product they are buying.
3. Branding is an alignment of 3 things:
  - a. Top management strategic goals and what they seek to accomplish
  - b. The staff's perception of the company and what it stands for (culture)
  - c. The target customer's perception of what the company truly delivers, along with their image and position.
4. Brand is the trust of the delivery of a *consistent* customer experience or outcome. You have to ask yourself; 'What does the Brand *consistently* deliver?'
5. Your brand has to demonstrate your uniqueness. Products and services can be copied, but your Brand is your uniqueness.
6. Every employee, from the worst to the best, is delivering your brand every day (so hire accordingly), and from the 'on-hold' music to the language of the

invoice to the dress code to the FaceBook pages of the employees.

7. Your target customers will be the biggest factor in shaping your Brand.
8. The Brand must be relevant to the customer; it has to ‘*mean*’ something of true, down-to-earth value.
9. It must be inspired and inspiring so that all are enthused and motivated by it such that all want to take action.

### **Industry Marketing**

Industry Marketing is all about what the ‘industry’ is doing; whether it is healthcare, manufacturing, financial, distribution, etc. This is a lot of research. You need to understand this concept because later on in the book we will discuss being the ‘Trusted Advisor’ and that requires your understanding, and I mean REALLY understanding, your client’s industry. Industry marketing is to know what are all the ‘trends’ of the industry and all the conditions that will affect it: Politics, wars, weather, supply-chain, and shipping issues, workforce, new technology, regulations, etc. You have to look at these from an aggregate perspective and be able to make sense of them from the perspective of your client’s needs; and not your services or needs. You need a

strategic way of thinking and not tactical. This is a very, very important kind of marketing, and it will affect business, and when I discuss House File marketing and ‘Becoming the Trusted Advisor’, you will see why understanding industry marketing is so important.

### **Competitive Marketing**

Competitive Marketing is not important in terms of defining yourself, but it is extremely important in regards to your pricing and the TCS (Time to Close a Sale) equation. Competitive Marketing is all about researching your competition. First off, who is your competition, and then who are they going after, what is their pricing, what are their offers, what are their terms, and everything else about them. Now, if you are going head to head with someone, then you must do competitive marketing. However, later on in the book, I will discuss ‘Becoming the Specialist’ and here I let you know how to move away from being a commodity to becoming a specialist. When you are a specialist, you have no competition (and therefore competitive marketing is not necessary).

### **Direct Marketing**

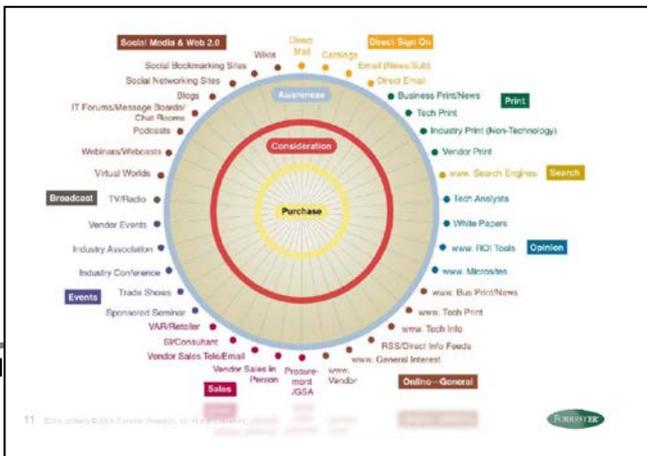
Essentially, most all sales are ‘direct’. You may have to be ‘direct’ with 10 members of a steering committee, or with each member of a Board, but all buying decisions are eventually made individually. The definition of direct marketing came from my brother, Jim.



*Direct marketing is establishing and nurturing a one-on-one trusting relationship that is beneficial to all.* Like a mother who nurses her little baby; they both benefit from this most beautiful form of natural life.

What most people do in sales and marketing is put together some kind of campaign that they *hope* works. Odds are great that it won’t work. For the majority of this book, the focus will be on just one kind of marketing – direct marketing, and specifically, using direct marketing to generate leads for the B2B environment.

There are, at least, 29 ways to generate leads. And some



groups, like Forrester, list 38 ways!

Here they are:

1. Telemarketing
2. Trade Shows
3. Industry Conferences
4. Webinars
3. Salespeople / Sales Calls
4. e-mail blasts
5. Direct mail
6. Catalogs
6. e-newsletters
7. Search Engine Optimization
8. Google Campaigns
9. Referrals
10. Vendors
11. Consultants
12. Resellers
13. Landing pages
14. Blogs / Chats / Forums
15. Microsites
16. Wikis
11. Customer Facing Events
12. Vendor Events
13. Procurement

14. White Papers
15. Business Print / News
16. Tech Print
17. Tech Analysts
18. Vendor Print
13. Specialty Advertising (pens)
14. Press Releases
15. Viral Marketing
16. Sponsorships
17. Social Media
18. Banner Ads / PPC
19. Networking
20. Associations
21. Business Partners / Channel
22. Co-marketing
23. Traditional Media (Space Ads
24. Billboard, Radio, Cable)
25. Speaking / Teaching
26. Video
27. IDI's – In Depth Interviews
28. Website
29. Offerings

At IBM we found that the Business Partners who have their own business and resell IBM products are very sound at what they do, but most have a darn hard time finding someone to really pay them fairly for what they are good at! This is typical to many small businesses all across America and Canada.

IBM recognized this problem and so they asked me to go around the country and present a three hour seminar to teach these owners how to generate leads for themselves, so that they could sell more IBM products. I spoke and presented my seminar in 21 cities in one year. I met a lot of great business owners – some I am still in touch with today (and if you are one of those who attended my seminar, then send me a note and I'll stay in touch with you, too).

The seminars were received very, very well because many of these technically sound business owners never had a marketing class in their life. In fact, the biggest complaint, after they had been there for three hours was that the class was too short. Below is a letter I got from one of the attendees:

Matthew:

I hope this finds you well. The New Year is starting off great. I have taken almost all of your information from the presentation in Pittsburgh and put it to use and you know what it WORKS. Thank you.

Respectfully

Joseph P. Harford

VP Sales & Marketing; Reclamere



## Chapter 4

# The List.

This is the most important part of the book. In those 3 hour seminars that IBM had put together on the topic of lead generation, the list and the subsequent topics off of the list took up nearly 2 hours of the total time! You see, from the list comes prospect marketing, house file (customer) sales, positioning, expertise, and understanding your geo. The list determines all those elements of a successful deployment of sales!



So to begin with there are two kinds of lists. Some will say the two kinds of lists are ‘Good lists and bad lists’. And this smart-alec answer proves the point that some lists work and some don’t. But the real answer that is relevant to us is that the two kinds of lists are; 1- those who are your customers, and; 2- those who could be. No other lists really matter. Understand, there are lists of people who may have inquired about your business and so they are certainly better prospects than people who never heard of you – true. But they are still not a customer and we will talk later on about dealing with those warm leads.

### **List 1 - The House File or Your Customer Base.**

**“During economic downturns, buying slows down, but it does Not Stop... history shows that in down markets one of the best things to do is tap into the gold mine that a company already has: its current Customer Base.” From Jim Dickie and Barry Trailer; *Successful Selling in Turbulent Times*. [www.csinsights.com](http://www.csinsights.com) as quoted in the Wall Street Journal 4/16/09**

**LISTEN UP!** If you read no other part of this book, read this part, do what is in it, and your business, on average, will increase by 5% to 20% or more! In fact, some clientsbusiness

increased by over 65% by using the methods presented here. Your customer base is your gold mine. (Start-ups to be dealt with in later).

Most probably, the 80 / 20 rule applies to your customers where 80% of your revenue comes from 20% of your customers. A few years ago, IBM was in a horrible position where 83% of its income came from just 6% of its clients! Yikes! So they put a big push into the area known as ‘General Business’ which are all the non-huge or Enterprise Businesses like Chase Bank and the US Government, etc. Companies with over 100,000 employees (Note: they used to call this SMB for ‘Small and Medium Business’ where businesses under 5,000 employees were called ‘small’ and the story goes that some owner with over 2,000 thousands employees met with IBM’s President, Sam Palmisano, and said, “Hey, I am anything but a small business!” So IBM changed the term from SMB to GB). The effort has been successful, although hard fought, and IBM continues to grow into new areas around the world.

## **The 5 Rules for Customer Sales**

Going back to your customer base makes huge sense. In fact our studies and those of the Direct Marketing Association

show that it is 5 to 50times easier to get a new sale from an existing customer, than it is to get one from a prospect.

Down below, you will see solid guidelines on how to approach your customers, but let's whet your whistle first with a simple and very successful campaign we ran for a client that you can do right away.

We did a simple 'reactivation' campaign for a \$13M data company to customers who hadn't bought in year. We did a customer satisfaction survey campaign to them where we mailed out 87 surveys in September of 2010 (a year from this writing and deep in the heart of the great recession). We received a total of 32 survey responses, both through direct mail and telemarketing. The 32 responses translated to a 37% response rate. Here is a copy of the survey:



**Customer Satisfaction Survey**

«FULLNAME»  
 «TITLE»  
 «COMPANY»  
 «ADDRESS»  
 «CITY», «STATE» «ZIP»  
 «EMAIL»

*Please note any updates  
 to your contact information*

Please do not share info with my sales rep

1. Please rank your experience with XXX Data Systems over the past year from very satisfied to very dissatisfied. How satisfied are you with:

	Very Satisfied				Very Dissatisfied
Our company overall?	<input type="checkbox"/>				
Our level of ability, level of contact and level of service?	<input type="checkbox"/>				
The purchases you made from us?	<input type="checkbox"/>				
Your level of knowledge of our overall products, solutions and services?	<input type="checkbox"/>				

2. Please rank the following from very likely to not likely. How likely are you to:

	Very Likely				Not Likely
Buy from us again?	<input type="checkbox"/>				
Recommend our products and services to others?	<input type="checkbox"/>				
Recommend our company to others?	<input type="checkbox"/>				

3. Please rank the following from very satisfied to very dissatisfied. How satisfied are you with:

	Very Satisfied				Very Dissatisfied
Our sales rep's knowledge, ability and service?	<input type="checkbox"/>				
Our sales rep's understanding of your business challenges?	<input type="checkbox"/>				
Our level of understanding of your business?	<input type="checkbox"/>				
Our company's overall communication and level of contact?	<input type="checkbox"/>				

4. How often does our sales rep contact you?

Monthly     Quarterly     Semi-Annually     Annually     Never     Other

5. Is the frequency of contact enough, too much, too little?

Enough     Too Much     Too Little

6. How often do you contact your sales rep?

Monthly     Quarterly     Semi-Annually     Annually     Never     As Needed

7. Why do you contact your sales rep? (Mark all that apply)

Product/Solution Problems     Product/Solutions Upgrades     Services  
 Marketing Needs     Business Ideas     Other \_\_\_\_\_

8. How important is it for your XXX Data Systems sales rep to have a high level of understanding of your industry and business so he or she can serve in a consultative, strategic manner?

Very Important     Important     Somewhat important     Not Important at all

9. What solutions do you plan to implement in the next 12 months?

Please do not send me a Starbucks card.

Your phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Thank you!** Please return by fax to 800-440-1413 or in the enclosed business reply envelope and return to our third party research firm by **September 20<sup>th</sup>, 2010** to receive your \$10 Starbucks Card. Thank you for your help in this important survey.

Form «SURVEYCODE»

We gave them a \$10 Starbucks card if they completed the survey and mailed it back in within 10 days. And up front, we included a \$2 Bill which was paper clipped to the letter.

The letter was very simple and it never asked for a sale. We wanted to build trust by just giving them money and coffee for their information.

On the next page is a sample cover letter for the survey which was for a different client that also did a customer satisfaction survey: In 6 months time, they generated \$2.75M with an ROI of 981:1. This means that this increased business for them by 21.1% in just 6 months time with NO NEW CUSTOMERS. And that is the power of a good Customer Revenue Program (we call our customer marketing program the GO! Program for Growth Optimization).

I recommend that you put this book down now, and get out a customer satisfaction survey, much like this one, right now. Use direct mail and e-mail to get the survey out and if you can, call everyone ahead of time to let them know you are sending them a \$2 Bill and a survey and that they will get a Starbucks gift card for completing the survey. You will have immediate opportunity to talk with your customers about new business. DO IT NOW.

*imperial metal solutions*

Custom Powder Coating Systems

November 17, 2011

«FULLNAME»  
«TITLE»  
«company»  
«ADDR2»  
«ADDRESS»  
«CITY», «STATE» «ZIPCODE»

Dear «SALUTATION»,

At Imperial Metal Solutions, we recognize that our success results from satisfied customers. We are firmly committed to a mutually rewarding partnership based not only on providing solutions to your coating, but more importantly, providing you and your business with exceptional product and service quality on a consistent basis.

As a token of our gratitude for your past business with us, I have enclosed a coated plate for you to display in your office.

This year we continue to focus on quality, surveying all of our clients in an effort to identify the expertise, products and services that are important to them and how we rate accordingly. Please take a few minutes to complete the enclosed survey before Thanksgiving (November 24<sup>th</sup>) and return it, by fax to 800-440-1413 or in the postage-paid reply envelope, to our third party research firm.

I encourage your candid comments. Your participation is important, providing valuable information to help us deliver the quality products and services you deserve.

Thank you in advance for providing feedback. I appreciate your prompt reply!

Sincerely,

*Paul Libby*

Paul Libby  
President

P.S. I really do appreciate your willingness to take a moment to complete our brief survey. As always, please feel free to contact me should you have any questions. Thank you for your feedback.

Time to Sale =  $\frac{\text{Risk} \times \text{Cost} \times \# \text{ People}}{\text{Pain}_{\text{mine}} \times \text{ROI} \times \text{Trust}}$

Hi-Q-group

## Why House File Marketing?



**5 to 50 Times Easier to sell to**

**\$50 ≠ \$250 to \$2,500**

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Figure 4.2

If you are going to spend \$50 to get a new sale from an existing customer, you will have to spend \$250 to \$2500 to get a new sale from a prospect! Yet 90% of all marketing dollars that I have seen goes toward prospect marketing.

For each and every one of your customers, you want to do five things, and only five things:

- 1. Survey them and communicate with them**
- 2. You want them to buy more from you.**
- 3. You want them to buy more often from you.**
- 4. You want to keep them.**
- 5. You want to get referrals from them.**



This is all there is to customer marketing and sales!

**Rule # 1: Survey them.**

How to survey your customers is mentioned above. As surveying your customers is not really a goal, rather – ‘Find out what they need’, is more of what is meant. The important elements of a customer satisfaction survey are:

1. Make the survey 1 page if possible.
2. Have the survey questions be simple check boxes.
3. Give them a gift (premium) up front and back end.
4. Direct mail it and electronic mail it.

5. Use a self-addressed stamped envelope to get the surveys back.
6. Call them to alert them that they survey is coming.

### **Rule #2: Buy More From You.**

Sometimes, you can't have them buy more from the existing product or service offering that you have in your toolbox. If you don't, then your toolbox is missing a tool or two. Go and get it. For example, let's say you are an accounting firm and you are doing taxes for a client. Why not offer them bookkeeping or payroll services? Now they are buying more and more often from you. If they have bought all of your services, then maybe you team up with a law firm and you now can offer legal services and get a commission from the law firm (are they allowed to do that? You get the point).

Here is another example of that. Let's say that you are a server reseller (old time main-frames) and an IT Application Development company. What you do is sell IBM or Oracle or someone else's servers. You come in, you install them and then you have techies come in and do the programming to make sure it is all humming along (staffing). And that's all you do. So how can you get your customer to do the 5 Rules of the House File? How can they buy more? How can they buy more often? You get how to keep them (or do you?).

And you would love to get referrals from them, but you're not exactly sure of how to do it. Here is what you want your customer to do.

So they bought a server from you and you are putting it in and that's all you do. They can't buy any more servers from you, so are you stuck? No. Remember, your customer trusts you more than somebody they don't know and they understand how to do business with you over somebody they don't know how to do business with. Your customer has other needs and issues related to what you do. So you talk to them and you survey them as discussed. This is done by simply asking them, "Hey I know we do servers for you, but I think we can help you in other ways, too. Are you looking at things like storage, or power, or mobility, or disaster recovery?"

From here, you begin the discussion to find out their full needs which will give you four choices of how to act:

1. Say that's nice and do nothing (no money for you).
2. Refer them to someone who does this for a living (little or no money for you).
3. Partner with a company who does this (not a bad choice, some good possible money for you, and a short learning curve).

4. Learn about this area and expand your business – Most money for you; now and into the future.

In order to grow, you need to grow on both the X and Y coordinates. That means you have to get new customers (Y coordinate) and you need to get wider on your offerings (the X coordinate). It is not recommended to go outside of your sweet spot. Most small businesses have been guilty of that, and companies almost always lose focus when they go into areas they don't belong just to chase a buck. Staying in related services and offerings does more than just get some income for the business; it also helps your customer because, as stated before, they would rather deal with you than an unknown. You are doing them a favor and you are now expanding your product and offering set to your customers and other potential customers – nothing bad happens from this. One of our clients at Hi-Q group was a small, solo-operated CPA firm, and he went and expanded his offerings, via partnering, to M & A consulting, corporate law and even some marketing. The marketing side didn't work out, and that makes sense. It was not in his sweet spot, but the M & A consulting was right in the same area. By keeping to the five rules of the House File with him, we were able to increase his small practice by 65% of monthly billings!

### **Rule #3: Buy More Often From You.**

Continuing on with your computer server company, let's say the customer now bought some storage from you because of the conversation he had. It worked! They have now 'bought more'. How do we get them to 'buy more often'? You will get them to buy more often from you simply by talking to them. You know that people are becoming 'data junkies' and so you ask them, 'how are you managing your storage?'

"We are working on that now," is his answer.

"How about if we manage it for you and give you a monthly report of your storage and disposal documents? The first 3 months will be free for you, OK? And then there is no obligation if you don't like it."

They agree and are now buying from you every month – they are now buying, "more often". The revenue you have now realized has more than doubled from this client in just a few months, and the client is happier, too. You helped this client 'become more agile' because he avoided the headache, disruption, and uncertainty of finding a new, risky, vendor. If you realized you did all this for the client, you could probably have charged more. Many of you are thinking that you can't

possibly charge more money, but it is almost certain that you are most probably not charging enough.

Let me relate a story about that to you. My good friend, Al Foote is a CAD Software reseller, and he relayed this story of why you need to charge your customers more money (I'm not sure where he got the story from, so if this is a copyright infringement, I apologize and please don't sue me).

There was a car salesman named Paul who was very successful at selling new cars. One day a friend of his named, Shawn, came up and said, "Hey, Paul I need a new car. Can you give me a good deal?"

And Paul says, "I'm going to give you a great deal, but you will end up paying more."

Confused, the friend says, "I don't get it."

And Paul says, "Shawn, you trust me don't you?"

"Of course I do. I trust you more than just about anyone."

"Great. How much do you trust the car salesman down the road that you haven't met?"

"Not at all."

"So who do you think will give you the true best deal? Who do you think is really going to look out for you and make sure you get exactly what you want and need and nothing more and nothing less – him or me?"

"Well, you, I'm sure," says, Shawn.

“Exactly. And that is why I am going to charge you 5% more than anyone else. After all, what is the peace of mind worth to you? You won’t have to shop around and waste time. You won’t wonder if you got the best deal. You won’t have to wonder if this car is a lemon that they are trying to get rid of, and all those other things that creep in the back of your mind once you sign the dotted line. With me, you will get the best car there is for you; Period. Is that worth 5% more?”

Shawn thinks it over and says, “Let’s do it.”

Your customers trust you and you are saving them valuable time and risk. Risk avoidance is worth a lot today. Raise your rates and fees.

#### **Rule #4: ‘Keep Them’.**

People overlook the value of keeping customers.

Take a look at this diagram on the next page:



Figure 4.4 Retention

This simply shows how much business was left, if a company got no new customers, and they were to be at customer retention of 90%, 80%, and 70%. Some think 90% is pretty good; others think it is horrible, and those who think it is horrible are right. If you are at a retention rate of 90%, and you get no new customers, then after four years, your revenue is just 66% of what it was; and if you are at 80% customer retention, then you are at 41% of where you were after four years, and 70% retention means you only have 24% of your business after four years!

How do you keep customers other than by doing superior work at a fair price? (That is a good way, for sure.) The other thing to understand is that people will do business with those with whom they like. Therefore make sure these companies like you and trust you.

There are several things you can do to have companies like you or like doing business with you. First, just send a simple ‘Thank You’ card every time they send you a check. You can also just ‘buy the staff a lunch’ once in a while. You can take them donuts in the morning. There are a hundred things you can do. Perhaps one of the best things to do is to just throw a little customer appreciation luncheon every quarter. You will accomplish two things with this. First, they will loosen up and they will just start to ‘like you’ more.

Secondly, what typically happens is that during the lunch the one manager will say, “Hey Sue, do you happen to know who a good reseller company for Lenovo PC’s is? We need to refresh our stock and our current reseller went out of business.” Business opportunities will open up for you.

Conversely, at the luncheon you say, “Hey Joe, I’m trying to get to your legal department because I think your storage policies may not be in line with the latest regulations I read about.” Now you just got a referral. This is a simple example of how you can do the five Goals of the house file – your customers.

For our clients, we try and do each one of the five goals every month, so that quarterly we give them a little party, we ask for referrals, we ask for more business and we ask for it more frequently.

## **Rule # 5: Referrals.**

Referrals are the most efficient means of prospect sales there is; and very few do it very well. It is hard and time consuming. As well, people don't like to bug their customers for referrals, but they should. One of the reasons why we don't ask our customers for referrals is because we are scared of the response; we are scared they will say 'no' and thus reveal how unhappy they are with us. It's similar to customer satisfaction surveys. Fear is the driving force for not asking for our customers for referrals and the same goes with surveys on their satisfaction level. We are afraid the survey will reveal what they don't like about us and then they will say, 'Yeah, why am I hiring you?' and you'll be fired.

According to Alan Weiss, best-selling author of 'Million Dollar Consulting (McGraw Hill © 2009 Alan Weiss pg 361), he claims:

*"I can trace about 90% of my business today to four common sources—which arose between 1985 and 1990! I can see the lineage better than any anthropologist trying to trace our ancestry. The DNA is quite clear.*

*"That's because clients talk to prospects naturally enough, but you can accelerate this a thousandfold by amplifying the communications. Here is the wording to*

*use with any client; adjust it for your own comfort and for the relationship: “referrals are the coinage of my realm. We’ve both been pleased with the results this project has generated, and I wonder if you’d be kind enough to give me three or four names of colleagues or contacts whom you believe could benefit from similar value.”*

*“That’s it. Then shut up and wait. Here are some guidelines:*

*“1. Set this up early in your relationship by mentioning to your client that you routinely ask for referrals when the project results begin to manifest.*

*2. Anticipate company policy and individual preferences by offering three options:*

*a. A personal introduction would be great.*

*b. It would be wonderful to be able to use your name.*

*c. I’ll happily withhold your name if you can just suggest the best people for me to contact.*

*“Now your buyer can decide how best to do this for you, not whether to do this for you.*

***You need to ask everyone you know for referrals at least twice a year; and quarterly is fine.***

3. *Use the approach and philosophy that this is a win/win/win. Your contact should be thrilled to be able to help others.*

4. *Use reciprocity. You probably refer people to your doctor, your accountant, your lawyer, and so forth. It's not unreasonable to expect them to refer people to you (Which is why you should always attach your name to referral business to others and follow up.)*

5. *Practice doing this smoothly.*

6. *Don't be put off. If the other person says, 'Give me some time to think about it,' reply, "Of course, I'll give you to tomorrow at 2."*

-----

There is another guru on referrals for the financial industry, named Bill Cates, who has a business on referrals called, 'The Referral Coach' ([www.referralcoach.com](http://www.referralcoach.com)). Bill offers a great boot camp on getting referrals and he also has a great, free 20 minute webinar called, "10 Strategies to Multiply Your Referrals". Here they are, with my thoughts after each one.

1 – ***Adopt a more powerful referral mindset.*** Is it your belief that a referral is safe or risky? If you believe that it is risky, then you are stuck there and will never move on. You have to adapt the 'safe' mentality, or you have to be

courageous. Quite honestly, you never know what your customer or client is thinking, and so it is always a bit risky, but ‘so what?’. Success comes from courage. If you want a do-little job, then go work for the government (I was tempted to write ‘do-nothing’ but I know many good government workers) because you don’t have to think too about risk too much, and nor will you ever be successful. So take on the courageous attitude of ‘everyone I work with will now be a referral base for me.’ And when you do this, three things happen:

- 1 – You will focus on becoming more ‘referable’. Which means you will focus on what you deliver to your customer – whether a product or service. You will become better at what you do.
- 2 – You will start ‘seeing’ opportunities you never saw before. The referral world will just open up to you a lot more.
- 3 – An ‘energy’ will appear around you that will make your more ‘business attractive’ and you will get more business. Don’t ask me how or why this happens, but it does. You are never stagnant or stationary in your life. You are either progressing or digressing. When you put energy in, then it attracts energy.

Bill Cates continues on his first point: ***“Leverage the full-life time value of a client and who they can introduce you to over time. Build the culture of referrals in all things in your business.”*** I spoke more on how to calculate the ‘Lifetime Value’ of a client (Chapter 5) but I never include the gains from referrals! Who knows how much more this could be (and yet another reason to make sure you ‘never lose a client’).

**Bill Cates number 2 point: *“Become more referable.”***

This goes beyond what I said above about doing better work because you want to be referred, this also focus’ on the necessity of being ‘liked.’ Look, here’s the bottom line; if you do all the things I mention in this book, you will grow your business, no doubt, but the one thing I can’t help you on is your ability to be ‘liked.’ And people do business with those they like. So work to become a nicer person than you already are. Build good business relationships. People won’t want to refer a jerk. Period. I don’t care what your results are. They just won’t refer you. So you have to work on your social skills. The number one key to being liked is discussed in great detail in Chapter 7 on Getting to the C-suite and Becoming the Trusted Advisor, and it is this. You have to ‘CARE’ about your customers. And I mean you have to

REALLY care – not just lip service. You have to listen and you have to ‘do’ things that take up your time.

According to Cates, invite your clients to ‘Celebration events’ – things like team victories, retirement parties, new product launches, awards, etc. And have them bring friends who fit the ‘referable sweet spot’. People want to be around winners. Make sure you keep on projecting that attitude.

3 – Bill Cates’ #3 Point: ***Promote The Referral Mentality.***

In other words, to your clients say, ‘Don’t keep me a secret.’ Make it known everywhere that you seek and expect referrals and that it is a cultured part of your business. For example, on your voice mail message it should say something like, ‘*Hello this is Matt Minarik and I am sorry I am not available to take your call. Please leave a message and I will get back to you quickly, and if this is a call from a referral, please let me know who it was that referred you to me so I can thank them.*’ Now, everyone who calls and gets your voice mail message is ‘cultured’ that you are in the regular business of getting referrals. So now when a person calls and they get the message they think, ‘Gee, this guy must be good. He is getting so many referrals that he has to put a special message on his voice mail!’

4 – ***Be confident.*** Bill Cates talks about confidence in asking for referrals, and I speak of confidence later on in this book as one of the most important things when talking to a C-level person or an owner. Confidence comes from practice and knowledge. Don't sound arrogant. I like the noted difference between Confidence and Arrogance as defined by Alan Weiss in Million Dollar Consulting<sup>1</sup>: “Confidence is the honest belief that you are highly capable of helping others. Arrogance is the honest belief that you have nothing more to learn yourself. . . (Smugness is arrogance without the talent).” Cates continues by saying to not beg for referrals. Begging sounds desperate and that positions you in a lower state. You have to, at the very least, be on an even eye-level with your clients who are going to refer you (at least in that product or solution), if not on a higher level (higher meaning, more successful, knowledgeable, experienced, etc.). Cates goes on to say that he uses the VIPS method for getting referrals:

V - Have a Value discussion. When you are going to ask for referrals from your client or customer, sit down with them and have a ‘Value’ discussion. ‘Let’s go over the successes of what we have done together.’ This is the true value of the relationship and this needs to be done upfront so that the

client or customer remembers (they oftentimes quickly forget) all that you did do for them.

I – Treat the referral with high importance. Make sure that when you ask for specific referrals, that you treat this conversation with great respect. After all, the person who is referring you is putting their reputation on the line for you – make sure you honor that. To add to that, make the referee feel as though this call and conversation is the most important thing going on in your life at that moment – which it just about should be (unless you are about to have a new baby or something like that).

P – Get Permission to ask for referrals. Don't assume it is ok to go and get them and ask for it twice; once up front and then once again just before you make the call.

S – Suggest names. Later on in this Chapter, I will talk about Database Profiling (Db.P.). This is a simple method to find out exactly who you should go after. So when you come to your client to suggest names, you will come prepared. A conversation that goes like this; “Hi Joe, we talked about your willingness to give me a referral, and I was wondering if you happen to know any of these other people who are also in the

same ABC Association as you are.” And then Joe looks over the list, and odds are strong that he will know a couple of these people, verses a conversation that goes like this (which is how most people ask for referrals), “Joe do you happen to know anyone who you can refer me to?” Which conversation do you think will get more traction? The former one for sure. Always come prepared with specific names. And, by the way, Cates points out that ‘the more prepared you come to the ‘referral meeting’ the more confident you will be, too, and coming prepared minimizes referral objections.’

**5 – *Diffuse Referral Objections and have a graceful exit.***

Cates is correct here again. Not everyone is comfortable in giving referrals and some companies even have policies against it (and against testimonials). So if someone is uncomfortable in giving a reference, then gracefully let it go. At the very onset let them know, ‘It’s ok to say no.’

**6 – *Turn referrals into introductions.*** A referral is one thing but an introduction is a much stronger approach. So pose the request for a referral into an interactive conversation, ‘Joe, how do you think Bill will respond to a referral by you, and, you know Bill, how do you think I should approach him?’

And now Joe is ‘involved’ in the referral process and may even have a stake in it.

7 – *Maximizing Event Marketing.* Whenever you have an ‘event’ you want to make sure you have the right referral contacts there. So have an event; i.e., golf outing, seminar, wine tasting, ball game, etc., and ask your clients to bring along some people on your ‘Sweet Spot’ list (described later). Cates says to make the events small because you want to ‘connect’ with every person there and so you should not have more than 12 people at the event that you want to connect to.

8 – *Get Referrals from high value centers of influence.* Now Cates is a specialist for the Financial Industries and so he talks about this in regard to Doctors, Lawyers, etc. But I will just go back to the Database Profiled ‘Sweet Spot’ list. Then Cates goes on to say, ‘Use Case Studies and stories of success.’ And he is right. These are things of great interest to people. They are oftentimes summations of months or years of problems and work encapsulated down to one page – who doesn’t want that in today’s time-shortened world?

Next Cates describes how to treat the referee (prospect). He uses an acronym (which doesn't always fit, but it's good enough) called TRUST.

T – Treat prospects like royalty.

R – Respond immediately – within 6 hours or less if possible (see Chapter 17 on Follow-through to see the importance of a quick follow-through).

U – Update the referral source and let them know of the progress of the referral.

S – Thank you referral source with a hand-written note (where is the S in this one; it must be the s in source?)

T – After the prospect referee becomes a client have them thank your referral source! This makes you more referable.

9 – *Approach the prospect with Confidence.* Here we are again with confidence. Before, we approached our client in asking for referrals with confidence. Now that we have the referral, we need to approach the prospect with confidence. (See 'How to talk to the C-level; Chapter 7).

10 – *Keep the courtship alive.* Oftentimes a referral does not turn into a client right away; in fact, most times. So you have to keep them in your vision. Send something of value. Initially you should give white papers and articles, etc. Then

invite them to events. Make sure you include them on blogs and newsletters. Lastly, you can send them a small gift (I have found that golf balls and chocolate are the best things to give when giving gifts).

Bill Cates does a great job with these points and there are more things to do as well. Alan Weiss also does a great, less structured means of getting referrals, but the most important thing is that both of them talk about adopting a culture of referrals from the onset of the relationship with the new client and as a pervasive approach to the business overall. From that cultural basis point, you will figure out, on your own, new ways to get referrals that are not listed here. As mentioned before, referrals are the most efficient means of marketing there is, but, because it has a mind-set requirement (and especially a fear conquering mindset), it is also the most difficult means of marketing. Getting referrals down correctly can eliminate most other marketing!

One of the ways we get our clients to get referrals, and to find new business is to use a simple, one page form that we created.

### **Client Strategic Evaluation and Analysis Meeting Form**

Our clients use this form to help them execute on the five rules of customer sales. It's the Client Strategic Evaluation and Analysis Meeting Form – the form itself accomplishes the first rule of customer marketing: Survey them!

Client Strategic Evaluation and Analysis Meeting Form	
Date	<input style="width: 80%;" type="text"/>
Client	<input style="width: 98%;" type="text"/>
Contacts	<input style="width: 98%;" type="text"/>
	<input style="width: 98%;" type="text"/>
Meeting Type <small>(lunch, phone, conf room)</small>	<input style="width: 98%;" type="text"/>
Rep:	<input style="width: 98%;" type="text"/>
Industry	<input style="width: 98%;" type="text"/>
Trends	<input style="width: 98%;" type="text"/>
	<input style="width: 98%;" type="text"/>
<b>Four Q's</b>	
Economy	<input style="width: 98%;" type="text"/>
Global Market	<input style="width: 98%;" type="text"/>
Internet	<input style="width: 98%;" type="text"/>
Regulations / Req's	<input style="width: 98%;" type="text"/>
Corp Strategy	<input style="width: 98%;" type="text"/>
Corp. Goals	<input style="width: 98%;" type="text"/>
Breakthrough initiative	<input style="width: 98%;" type="text"/>
Top 3 Challenges	<input style="width: 98%;" type="text"/>
	<input style="width: 98%;" type="text"/>
Are you able to help them?	Yes <input style="width: 40px;" type="text"/>
	Follow Up Needed? <input style="width: 40px;" type="text"/>
If so, how?	<input style="width: 98%;" type="text"/>
How Successful were you on the following:	
Interest in Buying more	<input style="width: 98%;" type="text"/>
Interest in Buying more often	<input style="width: 98%;" type="text"/>
Keeping them	<input style="width: 98%;" type="text"/>
Getting referrals	
Internal	<input style="width: 98%;" type="text"/>
External	<input style="width: 98%;" type="text"/>
Other next steps and Follow-up Dates	<input style="width: 98%;" type="text"/>
	<input style="width: 98%;" type="text"/>
	<input style="width: 98%;" type="text"/>

The idea of this form is to take a client to lunch and just go through this form step by step. If done correctly, by the end of the luncheon meeting, they will have set out on accomplishing all four rules of customer marketing and sales.

The way it works is that you ask the client to lunch and you tell him, “We’re going to talk business, but we are going to talk about your strategic goals, so be prepared for that discussion.” They will say, OK. But understand who you are taking out to lunch. If you are taking out the CIO, your questions will be a lot different than if you are taking out the IT Manager of the SAP procurement division. In either case, you need to do some research first before going out to lunch. This will only be touched lightly here, as we will cover this form in more detail when we get to Chapter 6 on ‘Getting to the C-suite and Becoming the Trusted Advisor.’

What you need to do, however, is to do research ahead and find out where their industry trends are going. Then you need to ask them about their corporate strategies and their ‘Breakthrough initiatives.’ Later on, we will go through ‘The Five Business Questions.’ Each one of these simple questions should take up to an hour to answer by the CEO or owner. These are very powerful, yet simple, questions and once you ask them you have moved yourself into a different realm with the client.

As shown in the earlier example, every time my clients follow ‘the five rules’, business increases by 20% or more.

### **Fear:**

I recall teaching my 6 year old girl, Marta, how to ride a two-wheeled bike one Sunday afternoon and she said she wanted to ride but that she was afraid. I felt like I was Maria in ‘The Sound of Music’ as I told her, if you want to ride a bike, then you have to face your fears! Well, you know, it’s true! If you want to get referrals, if you want to get clients, if you want to raise your fees or prices, if you want to . . . then you have to face your fears and ride right through them.

After a successful couple of rides I sat down with Marta and I said, “So are you still afraid?” “Well, I’m not as afraid as I was when we started.” And then we had a nice chat about fears and success in life.

If you want to be successful at sales and marketing and business in general, then you have to face your fears. PERIOD.

### **Segment Your House File:**

It is important to segment your customer lists several ways. The reason why it is important is that the more you know about your customers, the better you can sell to them and increase your revenue. What do you segment?

You can simply segment by

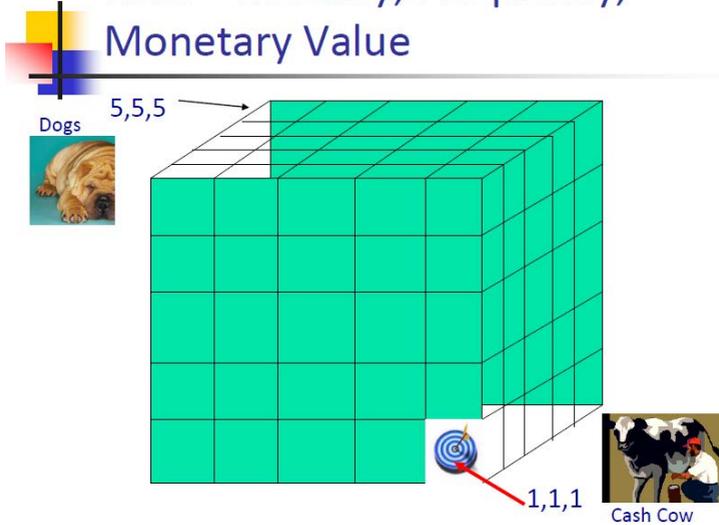
- Size
- Geography
- SIC Code
- Titles

## Segmentation of House File

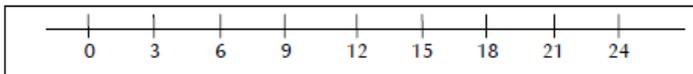


You can also do a very involved analysis called **RFM**. RFM is oftentimes more useful in a retail environment, but let me take just a minute to explain RFM marketing. RFM stands for Recency, Frequency, and Monetary Value. There are whole departments of marketers who do RFM analysis for companies like JC Penny, Sears, etc.

## RFM – Recency, Frequency, Monetary Value



What these very smart RFM marketers do is take their customer list and assign a timeline to it. For this example, let's say 24 months.



Next, they take all of their customers and assign, over the last 24 months:

- A. How recently they have bought from them in the last 24 months
- B. How frequently they have bought with them over the last 24 months, and
- C. How much money they have spent in 24 months total

Studies have shown that the most recent a customer buys from you, the most loyalty they have to you and that is why Recency is important. Frequency is simply how often someone buys from you within that 24 month period (and you pick the timeframe, so it could be 18 months or 60 months). Finally, Monetary Value is just how much total spend they have with you over the time period – all dollars added together from every time they shop.

We take the total for each of these and divide them into 20% increments. So every group is taken from top to bottom in each of the 3 categories (RFM) and put into the first 20<sup>th</sup> percentile, the second 20<sup>th</sup> percentile, etc., to the fifth 20<sup>th</sup> percentile..

RFM marketers call the people who are 1,1,1's 'Cash Cows!' and the ones who are 5,5,5's, they call 'Dogs!'.

Here is an example of my wife and I and Target stores. My wife shops there nearly every week or every other week, and we have 6 children, so our spend is significant. My wife, if categorized, will be close to a 1 or 2 in Recency. She will be a 1 if she 'just' went there; close to a 1 or 2 in Frequency, and hopefully, close to a 3 or 4 in Monetary Value (85% of the time we only buy necessities). Therefore, her RFM score will probably be a 1,2,3.Me, on the other hand, will go to

Target once every 3 months, buy 1 item and hope that it is a clearance item (I recall getting a brand new pair of gym shoes for \$10.00 once, and that was the only thing I bought).

My RFM score, conversely, will be more like a 3 for Recency, 3 for Frequency, and 5 for Monetary Value; I'm a 3,3,5. Which one of us is more valuable to Target? My wife is more valuable, of course. So Target, if they use RFM, will market directly to my wife and forget the Dog that I am (not that my wife is a cow). These smart marketers will then see who was, say, a 2,2,2 or better 6 months ago, and who is now a 4,3,3 or worse now. What they are looking for are people who were great shoppers and then stopped coming. Something went wrong and they want those people back. So they may send them a great offer to get them back in or they may even survey them directly if they were a 1,1,1 and dropped off.

You can see how smart companies use customer segmentation to market to their customers; the more data you have, the more you can market to them in an intelligent way.

## Lifetime Value.

### Calculate Lifetime Value

The "Worth" of a customer.

- Take your total number of customers by the 1/3 segmentation
  - Divide that by annual revenue
  - Multiply by the average number of years you keep a customer...That's Lifetime Value
1. 435 customers
  2. \$11.5M annual revenue
  3.  $\$11.5\text{M} / 435 = \$26,436$
  4.  $2.5 \text{ yrs} \times \$26,436 = \$66,091 = \text{Lifetime Value}$



Understanding the lifetime value of a customer is important for two major reasons:

1. So you know their true worth. People get shocked when they see this.
2. So you know how much money to spend on prospecting to get a new client.

Let's go through a simple way to calculate lifetime value. There are many more formulas out there than what is shown here, but this model is simple and it gives a clear picture of what we need for our objectives.

1. Take the total number of clients you have and divide them by annual revenue.

2. Take your total customers since your business began, and determine the average amount of time they stay with you.
  - i. This is either a happy or sad revelation because you will either see how many customers you lose every year, or you'll be happy to see how many are still with you!
3. Then take the annual average revenue and multiply it by the length of time, in years, and that is lifetime value.

In our example slide above: We have 435 customers and annual sales of \$11.5M, and so the average annual customer revenue is \$26,435. Then we did our calculation to see that the average customer stays with us 2.5 years and so we multiply 2.5 times \$26.435K and we get a lifetime value of \$66,091 for each customer.

Now you can get a little more inquisitive and analyze around several different scenarios. What if we did this exercise for just the top 20% of clients?

If your business is like most businesses, then the 80 / 20 rule applies where 80% of revenue comes from 20% of your clients. In fact, the 80 / 20 can apply to many things in life. Most of us only wear 20% of the clothes in our closet in any

six month period. Odds are you only look at 20% of all the websites you have bookmarked on your PC.

There is a story that was told by a Duke University MBA Professor about the 80 / 20 in relation to a company called Illinois Tie and Wire which, at the time of the story, was a \$1.3 Billion company and had thousands of clients.

The story goes that they decided to look at their top 20% of revenue producing clients to see how profitable these clients were – remember this is just the top 20% of revenue producing clients, which were 169 of them. They divided all clients into one of four quadrants:

- I. High Price to client and Low cost to service to ITW
- II. High Price to client and High cost to service to ITW
- III. Low Price to client and Low cost to ITW
- IV. Low Price to client and High cost to ITW

What they found shocked them!

## 80 / 20 – To Live By



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In Group I – only 20% of the top 20% (or 4% of the total client base) was in the best category. Another 45% was either in the category II or III (and it is assumed here that they made some profit, but the professor didn't say). But what they found was that those in Group IV, who comprised 35% of the top 20%, or 59 clients, were LOSING money for ITW!

The 80 / 20 analysis of your whole business, using this same model, will be very revealing to you as well. Do the analysis like ITW and see who is the most profitable and then you can see which 'vertical' and size of business is the most profitable. If you do this type of 80 / 20 analysis, it will help you in numerous ways:

- I. Identify your true best clients

- II. Change the way you deal with lower producing clients
- III. Identify your best ‘type’ of clients
- IV. Identify your best ‘teams’
- V. Identify your ‘worst’ type of clients
- VI. And things I am not even sure of, but you will be once you do this.

## Worth

The triangle below probably represents your business where you have business, by revenue, into 3 categories: Top 1/3, middle 1/3, and the bottom 1/3. Using the 80 / 20 rule is a superior exercise to do, but for simplicity sake, it’s easier to divide your customers into just these three categories.

Your top third are your Cash Cows (remember RFM?).



These are your best customers who do more than just provide good income:

- They give good references
- They expand your scope of expertise
- They allow you to grow your practice beyond your current capabilities
- They give you confidence (critically important)
- They give you the view as to who else you should go after.

Your middle third are your ‘Growth Clients’. These are the ones who you have a great potential with. These are the ones where the five rules of House File Sales and Marketing really apply:

1. Survey them
2. Have them buy more
3. Have them buy more often
4. Keep ‘em
5. Get referrals.

You should expend a good amount of energy with these top two groups.

The bottom third is your lazy, good-for-nothing brother-in law who won’t move out. He just robs you of your time

and money. This client is often the deceiver. Many times this client is HUGE and so you think the potential is great. There is a rule for this client – ‘Up in 6 or out!’ What this means is that you give this client 6 months to move up in revenue and worth to your organization or you fire them. We all have these types of clients and you need to be a bit courageous and be ready to fire them – and make sure you tell them, too.

I was giving a talk to a John Carroll University’s Entrepreneur’s Association one morning on this very topic when one owner raised his hand and told me that he fired The Cleveland Clinic – one of the world’s largest and most prestigious health care providers for the exact reason I mentioned. He explained to the other 80 business owners in the crowd that all they did was want to be treated like the star athlete who never tips, never pays for anything, and is always treated like a king. He fired them, and his business grew after that.

At another presentation I was giving, a stamping plant owner did the same thing. They had a major client who took up their whole second shift, but there was no profit in it! Their customer promised to order more work when they signed them up, but never did. So, they fired this customer and shut down a whole second shift. They did this in 2009 when

the recession was deep – they were one of the few companies that made it through with no problems – they had courage.

## Prospect Marketing and The List:

We spoke about the customer file, but what about the prospect? There were five rules of the customer file, but with prospect marketing there is only one goal: **Get them to become a customer.**



The left triangle is a typical representation of your current customer database where most of the customers spend a little and just a few spend a lot of money. The squiggly shape on the right diagram represents the prospect list. It is squiggly because we are not real sure of the size of the prospect list; we call this list the ‘universe’. In order to market and get sales from prospects, we need a ‘list’ of

prospects. These lists can be found in many places. Overall, there are two kinds of prospect lists: Response Lists and Compiled Lists.



Compiled lists are just what they say they, compiled from public records. These lists are inexpensive and oftentimes not too accurate – perhaps 70% accurate. They are sort of like the cheap white bread of lists.

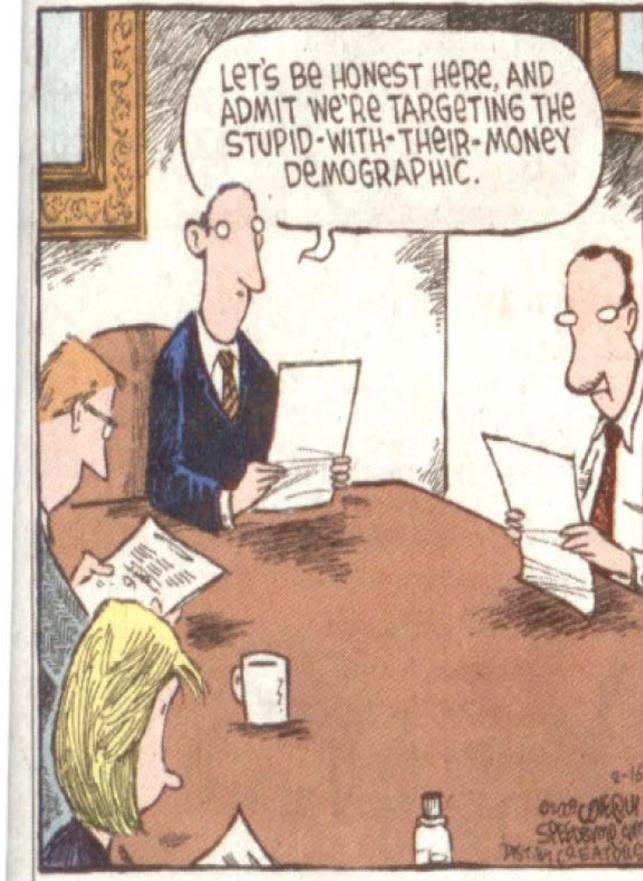
Response lists are called ‘Response’ because the people on the list responded to something. Maybe they joined an Association or are on a magazine or trade journal list (are there any magazines left anymore?). Maybe they filled out a survey, or are on an educational site, or inquired about a software or promotion, but somewhere they completed information about themselves. These lists are MUCH more

valuable than compiled lists and I use response lists for my clients much more than compiled lists. These lists are the whole grain breads of lists – nutritious, rich, and more expensive.

There is another kind of list that I have used for consumers and that is a psychographic list. What this list does is compile people by profiles. For example, at Hi-Q group, we have two clients who cater to the high end of consumers. Experian is a major list company who has these psychographic lists and they call them ‘mosaic’ because it is a mosaic of several things that categorize the customer. For the two clients who cater to the high end, we use the top two profiles labeled A01 and A02.

They list this group under the heading of ‘Affluent Suburbia’; A01 is ‘America’s Wealthiest’, and A02 is ‘Dream Weaver’. They have categorized everyone in America into 19 groups and 71 subgroups. You and I are in one of these groups. These groups are listed below:

## Speed Bump | Dave Coverly



From the Cleveland  
Plain Dealer

Mosaic USA group and segment structure

<b>A</b>	Power Elite 6.19%	A01	American Royalty	0.79%
		A02	Platinum Prosperity	1.43%
		A03	Vida and Cabernet	0.96%
		A04	Picture Perfect Families	1.43%
		A05	Couples with Clout	0.41%
		A06	Jet Set Urbanites	0.98%
<b>B</b>	Flourishing Families 4.42%	B07	Generational Soup	0.98%
		B08	Babies and Bliss	1.65%
		B09	Family Fun-tastic	1.22%
		B10	Asian Achievers	0.56%
<b>C</b>	Booming with Confidence 5.89%	C11	Aging of Aquarius	2.34%
		C12	Golf Carts and Gourmets	0.41%
		C13	Silver Sophisticates	0.97%
		C14	Boomers and Boomerangs	1.62%
<b>D</b>	Suburban Style 5.88%	D15	Sports Utility Families	1.77%
		D16	Satiated in Suburbia	0.77%
		D17	Cul de Sac Diversity	1.03%
		D18	Souful Spenders	1.45%
<b>E</b>	Thriving Boomers 5.13%	E19	Full Pockets, Empty Nests	1.10%
		E20	No Place Like Home	1.50%
		E21	Unspoiled Splendor	2.52%
<b>F</b>	Promising Families 3.90%	F22	Fast Track Couples	1.59%
		F23	Families Matter Most	1.77%
<b>G</b>	Young, City Bove 2.61%	G24	Smart Saving Singles	1.59%
		G25	Urban Edge	0.72%
<b>H</b>	Middle-class Matting Pot 5.76%	H26	Progressive Potomac	1.00%
		H27	Birkenstocks and Beemers	1.18%
		H28	Everyday Moderates	1.09%
		H29	Destination Recreation	2.49%
<b>I</b>	Family Union 5.40%	I30	Stockcars and State Parks	1.50%
		I31	Blue Collar Comfort	1.38%
		I32	Latin Flair	0.98%
		I33	Hispanic Harmony	1.55%
<b>J</b>	Autumn Years 5.64%	J34	Aging in Place	2.41%
		J35	Rural Escape	1.78%
		J36	Salted and Sarsible	1.42%
<b>K</b>	Significant Singles 4.79%	K37	Wired for Success	1.60%
		K38	Gotham Blend	1.01%
		K39	Metro Fusion	0.79%
<b>L</b>	Blue Sky Boomers 5.11%	K40	Gotham Groove	1.92%
		L41	Booming and Consuming	0.87%
		L42	Rooted Flower Power	2.33%
L43	Homemade Happiness	2.91%		
<b>M</b>	Families in Motion 3.68%	M44	Red, White and Bluegrass	2.11%
		M45	Diapers and Debt Cards	1.47%
<b>N</b>	Pastoral Pride 7.20%	N46	True Grit Americans	1.68%
		N47	Countrified Pragmatists	1.66%
		N48	Gospel and Grills	1.81%
		N49	Work Hard, Pray Hard	1.95%
<b>O</b>	Singles and Starters 8.83%	O50	Full Steam Ahead	1.99%
		O51	Digital Dependents	2.99%
		O52	Urban Ambition	1.11%
		O53	Colleges and Cafes	0.41%
		O54	Striving Single Scans	1.29%
		O55	Family Troopers	1.79%
<b>P</b>	Cultural Connections 6.42%	P56	Rolling the Dice	1.69%
		P57	Meager Metro Means	0.62%
		P58	Fragile Families	0.73%
		P59	Nuevo Horizons	1.26%
		P60	Cluded Strivers	1.12%
<b>Q</b>	Golden Year Goodness 7.26%	Q61	Humble Beginnings	0.99%
		Q62	Shaping Rewards	1.20%
		Q63	Footloose and Family Free	0.50%
		Q64	Town Elders	3.78%
		Q65	Senior Discounts	1.67%
<b>R</b>	Aspirational Fusion 2.88%	R66	Dare to Dream	1.89%
		R67	Hope for Tomorrow	1.03%
		R68	Small Town Shallow Pockets	1.71%
<b>S</b>	Struggling Societies 4.89%	S69	Soul Survivors	1.30%
		S70	Enduring Hardships	0.88%
		S71	Hard Times	0.68%

**Contact us**

The new generation of American households is reachable, but you have to know who they are, what they do, where they live and more.

For more information on Mosaic USA, visit [www.expertnet.com/Mosaic](http://www.expertnet.com/Mosaic) or call 1 888 219 1817.

Experian describe their segmenting as follows:

## **Mosaic® USA**

**Market forward with the next generation of household consumer classifications for the United States**

Experian Marketing Services' Mosaic® USA is a household-based consumer lifestyle segmentation system that classifies all U.S. households and neighborhoods into 71 unique segments and 19 overarching groups, providing a 360-degree view of consumers' choices, preferences and habits. The new Mosaic® system is the first segmentation tool built in the U.S. market in the past five to 10 years and reflects critical new data presented in the 2010 census.

If you need a list you can acquire one in one of four ways:

- A – Find out who has a list, like an Association, and buy it from them directly.
- B – Go to the library and use their reference services – these are free! Reference USA is a good, free source.
- C – Go on-line and get a list – If one Googles 'Contact Databases and Lists' you will get about 234 Million Hits!

And so how do you know where to get a list? You don't and that is why you should always use a list broker. A list broker is someone who researches what lists are best for you and then gets a 20% commission from a response lists and will get a mark-up for a compiled lists since they are so cheap.  
D – Use a Mailing List Broker.



I am fortunate that my sister is a mailing list broker:  
Mary Minarik: List Resources: listresources@netlink.net.

List brokers will listen to you about your marketing campaign and then do some research and then come back to you with some suggestions and even give you some data cards to view.

Here is an example of a data card:

# Data Card

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SUPPLY CHAIN MANAGEMENT REVIEW		02/26/2009	PAGE 1
			M094866
13,799 Total Subscribers	\$150/M	----- DATE -----	
4,551 Email Addresses	\$1500/F	01/01/09 UPDATED	
13 United States		01/22/09 CONFIRMED	
13 US Territories		----- UNIT OF SALE -----	
23 Canadian	\$250/M	N/C	
Mailing/Telemktg	\$250/M	----- MEDIA -----	
Mailing/Email	\$510/M	CONTROLLED CIRCULATION	
Mailing/Email/Telemktg	\$610/M	----- ADDITIONAL CHARGES -----	
Email/Telemktg	\$535/M	\$20.00 Number of Employees	
Fundraiser	\$100/M	\$60.00 Phone Number	
Counts Thru 12/31/2008		\$20.00 Sales Volume	
		\$20.00 SIC/NAICS Code	
		\$10.00 Title Slug	
		\$20.00 One Name per Locatio	
		\$20.00 Job Title	
		\$20.00 Personalization	
		\$20.00 Canadian	
		\$20.00 Bus/Industry Type	
		\$10.00 Geo/Geographical	
		\$10.00 CASS Cert Postal Pre	
		\$10.00 Suppression	
		\$3.00 Keying	
		N/C Hch Name	
		\$10.00 Run Charges	
		\$60.00 Email Delivery (flat	
		\$60.00 Diskette (flat fee)	
		\$60.00 CD-ROM (flat fee)	
		\$60.00 Modem/FTP/BBS (flat	
		N/C Transmission	
		\$30.00 Recency	
		----- MINIMUM ORDER -----	
		5,000	

Additional Charges:  
 Company Name Match/Omit @ \$50/M  
 Zip-  
 Select/Omit @ \$10/M  
 Select/Omit (manual) @ \$75/F

50+ @ \$10/Each  
 Order Charges:

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\$250 / M means it costs you \$250 for every 'mili' or thousand names. So if you buy 5,000 names, then it will cost you \$1,250 plus any 'selects'.

If you want to 'select' a particular 'sales volume', then you will pay an additional \$20 per each 1,000 names.

This tells you what your 'minimum' order, or cost, must be; i.e., you must pay for 5,000 names, even if you only want 2,000.

You can see from this that it shows '\$250 / M' and that means that the base cost of the list is \$250 per every one thousand, or mili (thus M) names.

There are specifics you may want to 'select' and these, amazingly enough, are called 'selects'. For example, in this list if you want to select a particular sales volume of a company to select, it will cost you an additional \$20 / M.

At the bottom, this list requires that you pay for a 'minimum', and in this case it is 5,000 names – even if you

only want 2,000 names, you still have to pay for 5,000 of them.

## Database Profiling

Finding outside lists by a good mail list broker is good, but for business (and consumer), the best way to find the perfect list is based on this premise: *‘The best new customers look just like your existing customers.’*

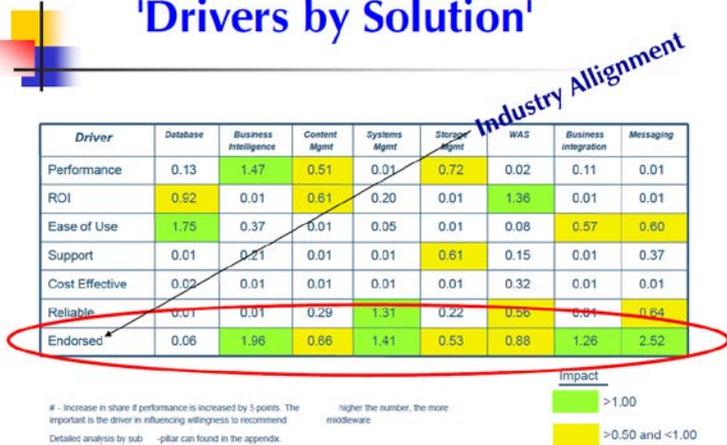


## Best New Customers Look Just Like Existing Customers

Two studies demonstrate the proof of this. The first was a study done by IBM Market Researchers who wanted to find out ‘what were the different ‘drivers’ of why people bought different software’. In that, what drove them to buy a particular piece of software?

And this diagram shows the results of their study:

## 'Drivers by Solution'



Across the top row are the different types of business software: Database Software, Business Intelligence (BI), Content Management; Systems Management, etc. Down the far left column are the different 'drivers'; Performance, ROI, Ease of Use, etc.

The metrics were not fully explained when this was presented, but certainly, everyone who scored above a 0.5 to 1.0 got a yellow shaded box and everyone who scored a 1.0 and above got a green shaded box, and everyone who scored below a 0.5 did not get any shading at all.

If you look at the 'drivers' and go across the rows, you will see that out of the eight software applications, most drivers hit 2 or 3 drivers that are either in the yellow or green shading; except for one: *Endorsed*. *Endorsed* hit 7 out of the

8 as an important driver. What does ‘Endorsed’ mean? It means that companies *within their industry* ‘endorsed’ the software as good for their industry. And four of the seven are in the green and the highest score in this whole chart was a 2.52 which is in the ‘*Endorsed*’ driver for Messaging software. People want to know who else in the industry is using the software.

Another study, this one by Gartner, showed essentially the same thing. Here it was divided into companies of 100 to 2,500 employees and what it is that they want from any vendor. Here are the results of the study:



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### What Businesses 100 to 2,500 employees want

1. Understand Specific Industry / Business
2. Local (How many miles?)
3. Rapid integration of specific solution
4. End-to-End integration

1. Key Customers / Partners / Suppliers

Gartner, 2005

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Understanding Specific Industry Needs was #1. Lastly, there is a study by Marketing Sherpa which showed that 82% of prospect say that content targeted to their specific industry is more valuable.



## According to MarketingSherpa

- 82% of prospects say content targeted to their specific industry is more valuable
- 67% say content targeted to their specific job function is more valuable
- 49% say content targeted to their company size is more valuable
- 29% prefer content targeted to their geography

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These three studies reinforce the point that most of you already knew: new customers look a lot like existing customers. Business success comes with focus. Dr. Thomas Stanley, author of ‘The Millionaire Next Door’ describes the plight of most small business as ‘... There is a process called Database Profiling (Db.P.) which uses current customers to find new prospects that ‘look just like the current customers’. Database Profiling creates a unique ‘fingerprint’ of what your clients look like.

No one has this same fingerprint but people do have similar glove sizes. We are looking for unique fingerprints as much as possible. How you find the fingerprint is like this:



1. From whatever means you have your customers and their revenue (QuickBooks), you take the top 70% or so of clients. It can be any percentage you want, but try not to go below 70% because the bottom 30% oftentimes take up too much of your time and money as mentioned on page 93.
2. Sort them from most revenue to least revenue. This alone will be quite revealing for some business owners.
3. Remove all data except company name, address, and main phone number; the phone number is very important for a direct match.
4. Look up Dunn & Bradstreet <http://www.dnb.com/> and look under [Market Insight](#) to have your list profiled.

After doing this, you now you have your top 70% customer base and you have it profiled for the following:

- A. size by revenue and
- B. size by employees,
- C. geo (yes it's important),
- D. Market share (D&B provides this)
- E. SIC (Standard Industry Classification) / ISIC (for International Standard, etc.), or NAICS (The North American Industry Classification System), which is replacing SIC.
- F. You will also, if possible, segment or profile the list by titles, these companies suppliers, and RFM if you can (RFM = Recency, Frequency, and Monetary Value).

This is now the 'fingerprint' of yourcustomer base.

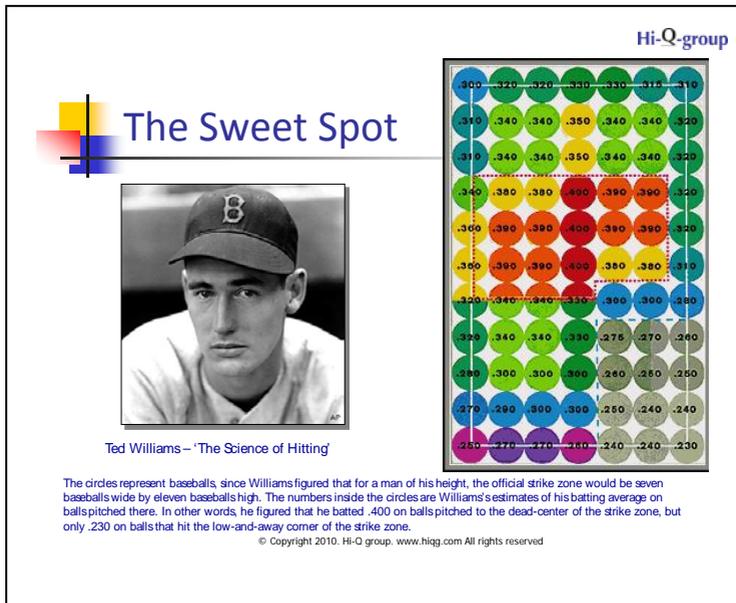
This fingerprint is valuable for 3 specific reasons:

1. It shows us who and what vertical (industries) we play the strongest in, and this shapes our messaging. For example, if by the profile you discover that 80% of your revenue is coming from Transportation clients, then you know what your 'sweet spot' or core industry is.

2. If you analyze it, and compare it with ‘trends’ for the upcoming year, you can gauge if you need to change course, or be more aggressive on the course you are heading in.
3. You now know what type of clients to go after. You have your ‘Sweet Spot’.

Ted Williams was one of the best hitter, if not the best, in baseball, ever. He wrote a book called, ‘The Science of Hitting’ (Simon & Schuster, New York; 1971), and in the book he shows his batting average if he swings at a ball in certain parts of a strike zone.

Here is his diagram:



If Ted Williams were to swing at a strike that was low and outside, then his batting average was .230; but if he swung at a strike that was chest high and inside, then he batted .400! These were strikes he is swinging at, not balls. So it is the same in business. Just because you ‘can‘ do the work the customer asks you to do, doesn’t mean you should. For Ted Williams, he would foul off the pitches that were low and outside, over and over again, until, finally, he got the pitch he wanted (or walked), and then he would swing at it. So in order to be the most successful, you must say no (foul off balls) to work that you could do and wait for the good pitch – the client that is in your sweet spot - so that you have the best odds for success.

Here is an example of what you get back from D&B when you do the Db.P.

You can see the # of companies that matched the profile of the original profile of their best customers. There were 59

4-digit SIC Code	4-digit SIC Code	# bus	%total bus	# matched	total Empl	total Sales	avg Empl	avg Sales	#bus in Market	% of Market penetrated	pen. index (base=100)
1731	Electrical work	59	4.8	59	1958	231.7	33	4.5	492	11.992	267
1711	Plumbing, heating, air-conditioning	46	3.8	46	1302	137.3	28	3	517	8.897	196
1542	Nonresidential construction, nec	46	3.8	47	1729	353	38	8	288	15.972	356
8711	Engineering services	40	3.3	40	1388	201.4	36	5.9	423	9.456	211
7389	Business services, nec	33	2.7	33	515	70.2	16	2.1	3230	1.022	23
1761	Roofing, siding, and sheetmetal work	30	2.5	30	891	90.7	30	3.1	113	26.549	591
7349	Building maintenance services, nec	25	2.1	25	970	18.1	39	0.8	304	8.224	183

companies for them to go after who are in their region, is the right size, have a need for what you do, and have total sales of over \$230M! If you combine the top 3 verticals that fit the profile, you have total sales of over \$700M and you have 150 companies to go after! You can also see (although a little tough in this view) their market penetration so you know which ones are worth going after. You can get all the specific data on each company; including names, titles, addresses, e-mail, phone, etc.

This is what Db.P (Database Profiling) is all about; it is finding the companies that are in your sweet spot and then going after them one company at a time. The great part about this is that you don't have to foul off any balls. You are saying, in essence, 'Each one of these pitches is in my sweet spot that I can hit a home run with.' This is the power of Db.P.

This tool is one of the most powerful tools that few companies ever do. Because too few companies know how to do this, they end up 'pounding the desk' to get leads and sales now – who cares if you are only going to bat .230 instead of .400 – to them, it's a sale! Alan Weiss, mentioned earlier, says that wealth is defined as discretionary time. In other words, you can work 70 hours a week to make \$150,000 or 35

hours a week to make \$150,000; who is wealthier? Using Db.P. allows you to get rid of the bad 35 hours a week.

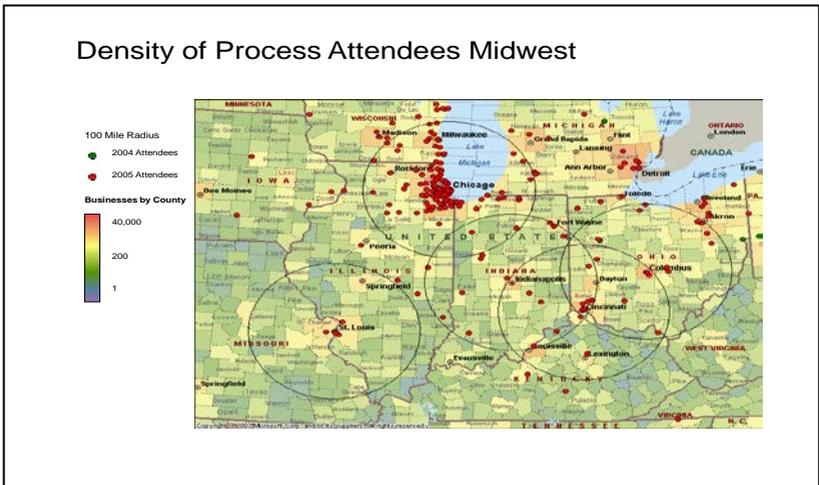
Besides the fact that not too many people know about Db.P., or how to do it, is that it takes work. You have to ‘think’ and analyze.

Database Profiling finds all companies in your sweet spot and then gives the following information to you:

- NAICS / SIC number
- Industry classification name (i.e., Banking)
- Business name
- Address and Phone
- Years in business
- Revenue
- Number of employees
- Executive titles and names
- Public or Private company
- Imports
- % Market Share

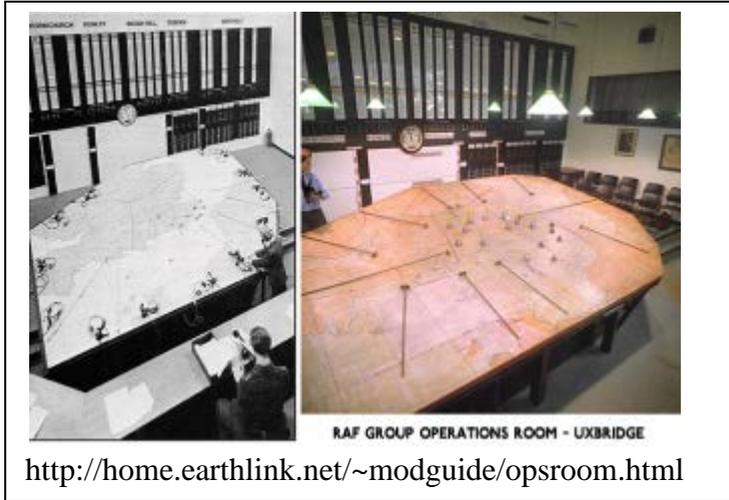
One of the elements of Db.P. is to find the geography of your potential clients. Today, anyone can take a physical address and map the location. This can be valuable for a host of reasons like, adding more sales people, geographic similarities, access via roads, etc. Here, one client, wanted to

see where he should add a sales person; even though, intrinsically, he knew where to add the person. His Board kept saying, “Take a look at the rest of Illinois – there is a lot of potential out there.” The client wasn’t convinced and so he asked us to map the potential (from the Db.P.): this map below of potential clients solidified the decision – Chicago.



IBM did a study and found that 83% of their customer’s business is within 60 miles of the business partner they bought the hardware or software from! This is because customers want to know that their supplier can be there within an hour in case something goes wrong. Responsiveness is the single most important factor that business want from a vendor.

Mapping your customer base, and your *potential* customer base, is extremely valuable. Liken it to the



operations room in those WW II movies.

They had a visual map of where everything was. They could they have just printed everything out on a spreadsheet, by longitude and latitude where everything was – but – geeze! So do database profiling and then make a map in your ‘Operations’ or ‘War’ room. You’ll be amazed at what comes out of it. Is it work to do this? Yes. But if you want to grow, then I find this exercise, simple and invaluable.

*“What you have to do and the way you have to do it is incredibly simple. Whether you are willing to do it, that's another matter.” Peter Drucker*

## **Power of multiple titles.**

Once there is a profile of the companies we are going after, the next operation is to select the titles to go after. Naturally, from doing the profile and segmentation of our list, we know which titles are best to go after, but what if we went after more than one title?

What if the budget is limited to only be able to go after a certain amount of customers; would it be better to go after one title and reach a broader swath of customers, or better to go after few companies and hit many titles?

That very question was posted with an IBM Business Partner and so we ran a test. We had a budget to go after 1,200 prospects. We had done the database profiling and so we knew the type of company to pull. So we took 600 companies and did a survey to the CFO and we took 200 other companies that matched the profile and went to the CFO,

and the CEO and the CIO with the same survey. We got a 23 1/2% response across the board (which is excellent). And that means that we reach about 140 companies for each test. But for the one with the multiple tests, we mailed to 200 companies, which means we penetrated 70% of the companies we went after!



## SEO / SEM.

There are books written on SEO and SEM and this is not going to be enough for anyone who is serious. As well, Google, the only real player in the game, keeps changing the rules on SEO ever few months and so what is written here is only a snapshot in time of what is going on with SEO. But for most small businesses, just understanding the basics is enough.

What we have been talking about with getting the lists is direct marketing. We are marketing directly 'to' the end user.

But Search Engine Marketing and Search Engine Optimization does the opposite; here the target market comes to you!

There is a difference between SEO and SEM.

Search Engine Marketing is using search engines like Google to promote a website. If you look at the image below, you will see Cabinets typed in the Google search bar.

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The image shows a Google search for "Cabinets". The search bar contains the word "Cabinets". Below the search bar, there are two main sections of results:

- Organic Results (Free):** These are the first several search results, including "Kitchen Cabinet Outlet", "Kitchen Cabinets Beautifully Crafted Custom Cabinets for Your Home", and "Cabinets Kitchen Cabinets and Bathroom Cabinets from Armstrong". A bracket on the left side of the page groups these results under the word "Free".
- Sponsored Results (Paid):** These are the search results that are labeled as "Sponsored" and are enclosed in a large oval on the right side of the page. A bracket on the right side of the page groups these results under the word "PAID". Examples include "Shoo Kitchen Cabinets", "Custom Kitchen Cabinets", and "Shoo Kitchen Cabinets".

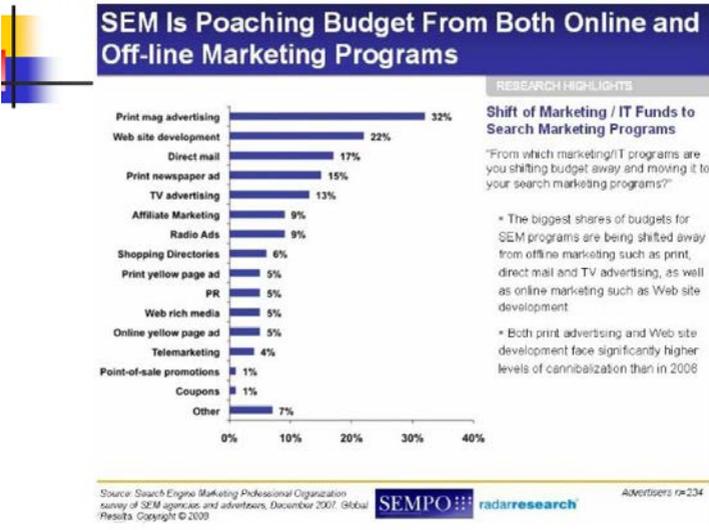
At the bottom of the page, there is a copyright notice: "© Copyright 2010, Hi-Q group. www.hiqg.com All rights reserved".

Search Engine Optimization is making your web site the most attractive to people using search engines, like Google, to find you. Google is on the consumer's side. So they are

constantly changing their criteria to make the search experience a great one for the consumer because if it is bad for them, then they will stop using it – that’s not what they want. As mentioned, with SEO, the customer is drawn to you, instead of you doing the research and finding them.

SEM is the Marketing side of using ‘search’. According to SEMPO (Search Engine Marketing Professional Organization)<sup>ii</sup> dollars are being shifted away from traditional marketing such as print, direct mail, and radio to SEM.

### The Shift of Marketing Dollars to Online Strategies



### PPC / AdWords.

Let's face it, we're looking for the least expensive way to drive customers to your door and Pay Per Click or Google Adwords will actually be the lowest CPA of any means for many consumer products. For B2B, the numbers aren't quite there, especially the higher end you go. For example, if you are selling office furniture, then PPC and Google Adwords may work very well for you as these almost function as consumer products.

When you get to higher end products like ERP systems, and high-end consulting services, then PPC and Google Adwords dramatically fall off the table of ROI.

For those who may still not know how they work, PPC (Pay Per Click) is a service where you ONLY pay when someone clicks on it; unlike space ads in a magazine where you have to pay for the ad regardless of anything. No one would even have to buy the magazine and you would still have to pay for it. But with PPC, you only pay when someone chooses to look at what you have to say. Your job is to quickly engage with them and get them to give you their information, so that you can immediately follow-up (see Chapter 12 on Follow-through). For those that do this well, it is very efficient marketing. You set up the ad, find the right web sites to place it on, and wait for the leads to come in!!

What you pay for each click is dependent upon what you want to bid for keywords that you pick.

Google AdWords are what was shown before with SEO – the AdWords is the paid search. If you look at the picture of the search page for cabinets, you will see the ‘Paid’ highlighted areas, and these are the result of selecting and paying for keywords or AdWords. The more you pay and the higher your ‘Score’ then the closer to the top you will be.

Companies pay top dollar to have these marketing practices analyzed and analyzed and done well they will be very profitable for companies.

### **EcoSites and SEO:**

Les Proctor is a brilliant web strategist. (<http://www.nicheworks.co/#>). In conjunction with others, Les has established a great method of SEO called ‘EcoSites’. Google co-founder, Larry Page, once described the “perfect search engine” as something that “understands exactly what you mean and gives you back exactly what you want.”<sup>iii</sup> And so Google has changed how they have done search indexes. The ‘hidden’ copy to ‘trick and trap’ on-line users will now push the site to the bottom as it will punish those web designers. What you want to build is a site that fits EXACTLY to what the customer wants. Google rewards that

and pushes it right to the top. Now, there are other criteria, too, like the age of the URL, but this exact search is what is most important to Google. For, the more the customer finds exactly what he wants, then the more he will use Google and the more money they will make.

To be successful in SEO means you need to build a website that is exactly what a customer is looking for; which is almost impossible since there are hundreds of millions of Americans. So what Les does for his clients is build one major web site that is clean and direct. Then, Les puts dozens to even hundreds of Landing Pages where each landing page is ‘exactly what the customer wants’ and each of those are linked back to the main website. By doing this, he gets people to organically move to the top one, two or three organic rankings within weeks! It so simple it is shameful that companies spend tens of thousands of dollars a month on SEO when all they need to do is build lots and lots of cheap, but VERY EXACT landing pages. Each landing page costs a couple hundred dollars and is up within a day or two, each.

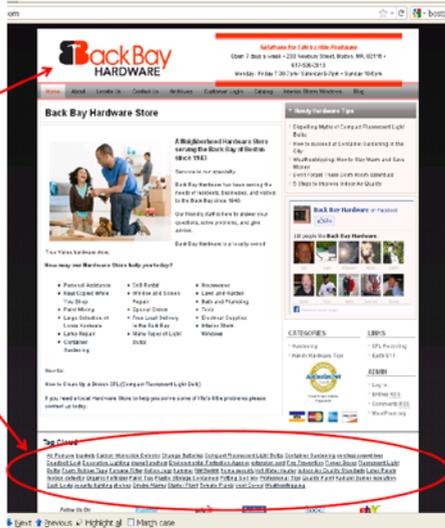
This website is one done by Les. It shows a simple hardware store; Back Bay Hardware in Boston. Before Les did his EcoSites they didn’t even show up on the first page of the Google search for hardware in the Boston area, and now

they are number 1 or 2 on the organic (free) part of the google search.

**EcoSites Web Strategy To Maximize Organic SEO**

Main page here

Dozens of landing pages or microsites labeled as specifically as possible to any hardware need someone may want – these all link back to the main page and drive up the SEO DRAMATICALLY!



To learn more, please contact Les Proctor directly.  
(<http://www.nicheworks.co/#>).

# How To Use Social Media and Mobile Apps.

It doesn't matter when you read this (and it is 8:00 pm in



September 20 of 2011 when this sentence was written), by the time you read this, it will most probably be obsolete. You could be reading this at 8:01 pm in September 21 of 2011, and it will still probably be obsolete – but the concepts here won't be obsolete. What you need to understand is that the use of Social Media is going to increase dramatically from where it is now.

*[Forrester Research](#) has released research results projecting that **social network marketing** spending will increase to about \$55 billion by 2014. The interactive portion of total*

*marketing spending is projected to grow from today's 12% to 21% of all advertising spending in the same period.'*<sup>iv</sup>

An article by Toolbox.com said,

*"...in a series of four surveys conducted by Toolbox.com and PJA from June 2007 through July 2009, nearly 3,000 IT professionals in each round of surveys reported on their media consumption habits. Among these survey participants, social media consumption consistently increased and outpaced editorial and vendor content consumption from Wave 1 (June 2007) through Wave 4 (July 2009)."*<sup>v</sup>

Needless to say, Social Media Marketing is making an impact – the full use is still to be either realized or junked – time and dollars will tell.

But as mentioned above, no matter what, the concepts are the same. Use social media to do 4 things:

1. Connect and bond with current and past customers so that they go nowhere else but you when they have a need that you can fulfill.
2. Use SM to establish yourself as the trusted expert (am not sure which word is more important there: Trusted, or Expert).

3. Use SM to find new customers because you ARE the trusted expert (or have them find you).
4. Use Social Media to ‘announce’ and keep your customers ‘engaged’.

The SM you use is dependent upon what you want to use it for. For our purposes, we will stick to business to business. Essentially that means throw out Facebook. In a few years it might be different (but I doubt it), but for now, Facebook is not your tool for sales to the C-level executive in the B-2-B world.

LinkedIn should mostly be used by you and the employees of your company for credibility and as a ‘profile’ page. Using LinkedIn correctly can have huge advantages. For example, let’s say you are a ‘data storage’ company. You sell hardware, software, and consulting services around data storage – it’s a big deal these days, especially with all the legal ramifications involved in storage. You decide to set yourself up as the expert and create a LinkedIn users group on data storage (by the way, there are nearly 1,500 ‘storage’ LinkedIn User Groups out there now!) where you invite your customers and prospects to ask questions of the expert and get free advice. There was a great article on a LinkedIn **Business** Development Discussion

group by AliciaFrobisher on how to use LinkedIn to generate leads for your business. Here it is:

### *Using LinkedIn to Generate New Business*

*LinkedIn is a very powerful tool for generating new business. When LinkedIn first began, it was primarily formulated for individuals to expand their professional network. Now, not only can individuals seek out connections in the online world, but companies can use LinkedIn to expand their client base as well. LinkedIn not only allows you to share information about your services directly with potential clients, but you can also research them, increase your company's visibility and most importantly - to generate leads!*

### *Get Noticed!*

*With so many social media platforms at your disposal, making sure you utilize all the tools is sometimes overwhelming. To make it simple, you can start by exploring LinkedIn's capabilities and personalizing your profile. If you create a public link that is easily searchable, the easier it will be for people to find you.*

*Also, by joining groups that relate to your industry, you can connect with people that you know will be interested in your company.*

### *Get the Conversation Flowing*

*Building online rapport with potential customers can help you cultivate relationships with them. Relationship building is a LinkedIn strength and will lead to referrals and business. One great tool for starting conversations with potential clients is to take advantage of the questions and answers section. The more you answer people's questions here, the more visibility you are creating for your company as an authority and the more likely they will be to use you in the future.*

*Furthermore, the first step in cultivating a relationship with potential clients is by sharing information. Get to know potential clients by researching their profile and offering some useful insights to get the conversation started. You can also start discussions in the groups you belong to, and say that if they have more questions they should visit your website.*

### *Utilizing Tools*

*There are tons of applications on LinkedIn that many of us don't know about. Most people only generate a profile with the standard sections that include previous experiences, but many don't know that you can also add your blog to your LinkedIn page or connect your Twitter account. If you post an update on LinkedIn, it will be shown on your Twitter feed as well.*

*Additionally, LinkedIn also offers an advertising program that helps generate more traffic for your company's website or LinkedIn profile. You can create a simple advertisement and then bid on how much you are willing to pay LinkedIn for each click that you get. The more clicks you get, the more potential business you are likely to receive.*

### *Devise a Strategy for Lead Generation*

*Outlining a plan of how you are going to generate leads can ensure that you take advantage of everything LinkedIn has to offer. By connecting with a certain amount of new people each week, you can make sure that*

*you are keeping your company's name fresh on people's minds. If they or someone they know needs your services, they are more likely to think of you first.*

*It's also important that you strengthen your company's online presence by joining a lot of groups each week. You should remain active in the groups by regularly starting or engaging in discussions that directly pertain to your industry. People are more likely to trust those who are knowledgeable and helpful when it comes to choosing one company over another.*

*Consistency is Crucial*

*Keeping your company's name high on the LinkedIn radar will guarantee the interest of potential customers. Consistency is the key to generating leads, so the more you stick to your LinkedIn connection plan, the more successful your company will be. Even though this may not happen instantly, if you use LinkedIn correctly and continuously, you may be surprised just how quickly people will be asking about you.*

*How You Can Use LinkedIn to Get Success in Your*

*Business and Professional Career? Why You Should Use It? Watch this Free Presentation at:*

<http://LinkedinSuccess.org>

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Social Media should be approached from a strategic perspective. According to toolbox.com there are 5 ‘Best Practices’ to follow when implementing your Social Media strategy.

**“Best Practice 1: Set Objectives First**

While it may be tempting to create a Facebook fan page, start a corporate blog, or send out a flurry of tweets through Twitter, marketers first have to ask themselves a series of important questions:

- What are the primary goals?
- Who is the target audience?
- Which social media resources does the audience use?
- When will the campaign start and end?

Social media marketing is a specific subset of online marketing, which includes other disciplines like SEM, e-mail marketing, display advertising, and affiliate marketing. Just as in those other subsets of online marketing, different

approaches will be employed through social media marketing for lead generation, brand building, public relations or customer service and feedback.”

Use the ‘SMART’ acronym to determine your strategic goals:

### **“Specific**

The objective should have a specific outcome. Launching a corporate blog or creating a discussion group is not as specific as generating 100 sales leads or increasing your quality score for customersatisfaction by 5%.

### **Measurable**

There should be a reliable system in place to track and record progress toward the objective.Increased “engagement” may not be as meaningful as measurements like connections establishedwith clients or comments made on your products and services.

### **Achievable**

The objective should be attainable given current resources and time frame. Leveraging an existingcommunity to generate 300 leads in 3 months is probably more achievable than building a robustcustomer community in the same time frame.

### **Relevant**

The objective should be relevant to overall company objectives. Becoming a well known blogger mayhelp build

brand awareness, but may not help improve customer service issues.

### **Time-based**

The objective should have a specific start and end date. A hard end date with specific midcampaign milestones will force marketers to adjust and optimize to meet goals.

### **“Best Practice 2: Build a Roadmap to Engagement**

Engagement” is a fairly nebulous term that has been used to describe one of the key benefits of social media marketing, namely the ability for marketers to engage with their customers in ways that have not been possible through traditional marketing. It’s important for marketers to keep in mind that engagement through social media is not an all-or-nothing proposition, and they can build increasingly sophisticated strategies for two-way communication with target audiences based on available budgets, resources, and comfort levels.”

### **“Best Practice 3: Examine the Costs and Benefits of Building Your Own**

Community vs. Tapping into Existing Communities

Benefits of establishing a community:

- Provides a platform for announcing new launches and building brand awareness of existing products
- Creates the ability to establish brand champions and customer feedback loops
- Produces opportunities for up-selling and renewals'

Benefits of tapping into existing communities:

- Provides the opportunity to prolong ROI (vs. traditional marketing)
- Accelerates ramp-up time needed to realize ROI (vs. homegrown communities)
- Leverages the expertise of community operators to optimize campaigns
- Requires fewer resources than building own communities”

#### **“Best Practice 4: Be Transparent to Win Customers**

In order to achieve social media marketing success in online communities, marketers must strive to be transparent about their identities and intentions. Members of online communities are savvy about marketers and will easily ferret out disingenuous interactions by marketers pretending to be something they are not.”

In other words, don't be afraid to tell people how to do something; the smart ones will realize your expertise.

**“Best Practice 5: Be a Listener, Not a Policeman**

Within a social media context, there will be discussion of the brand that does not align with the marketer’s goals. From negative feedback to incorrect usage of associated brand language, images, and characteristics, customers will not maintain the same care and caution that marketers exercise over their company’s identity. The best approach that a marketer can take is to understand that it is impossible to control the way the message is communicated by customers, but it is possible to act as a brand advocate in ways that further the company’s goals.”

In other words, make sure your ‘watch’ and your replies are in line with your strategic goals and your vision. Here is what they say about ‘Brand Detractors’:

“A few important tips when working with brand detractors:

- Identify yourself: in the spirit of transparency, marketers should identify themselves as representatives of their organizations.
- Act quickly: when a detractor gets to the stage of actively making their dissatisfactions known in an online setting, their frustration level is high. Marketers should act quickly to

resolve the problem, provide educational material, or customer service.

- Follow up: once initiating contact with a detractor, it's important for marketers to see the interaction through to its resolution. An unresolved interaction will do more harm than good, both with the original detractor and anyone who has witnessed the exchange.”<sup>vi</sup>

As well Natalie Bidnick, who, according to her title on LinkedIn is the Social Media Manager at Splash Media, On Air Educator, Content Creation and Script Production at Splash Media U wrote this excellent blog in December of 2011:

### *Creating a Social Media Marketing Plan*

*Using social media for your company seems easy, right? Post on Facebook a few times a week, tweet daily, and write a blog every once in a while. But a key element of social media marketing is creating a well-defined and thought-out plan to maximize your efforts and take your business to the next level.*

*First, make sure your social media marketing plan is aligned with your general marketing plan. When you distribute an email or company newsletter, be sure to*

*announce it through your social media channels. You should also place or print your social media site icons on all marketing collateral, especially your company website.*

*Splash Media U™ recommends driving all social media marketing activity to your blog site, as blogs are more easily crawled by search engines, which makes them show up higher in Google Page One results.*

*Your blog should hold interesting and original content that both engages and inspires the reader to want to learn more about your company. It should also have a “Contact Us” form, which readers can use to submit questions about your products and services. Successful social media marketing contains 90% informational content and 10% promotional posts. This is also referred to as the 90/10 rule. Ninety percent of your Facebook posts, tweets, LinkedIn updates, and blogs should be dynamic content or news about your industry in general. After you have engaged your audience with remarkable content, it’s considered acceptable to create posts that are a bit “salesy.”*

*Remember, social media is a fun environment! Too much sales or marketing talk doesn't bode well in this space. After you create posts that reflect 90% interesting material and 10% promotional content, be sure to set up a regular posting schedule. Depending on your industry, you may want to post once a day on Facebook and Twitter, and create at least one blog a month. It's important to keep broadcasting most days, so that your audience stays interested. Post a variety of material each week across all social media networks: ask your community questions to stimulate engagement and don't forget to post a funny picture or two to keep the conversations light.*

*Social media marketing, when planned and executed correctly, can increase awareness of your brand and add to your bottom line. Post regularly on all accounts, drive traffic to your blog, and create interesting and dynamic content to engage your audience and turn fans into customers!<sup>vii</sup>*

From this article, one can easily see that you can use SM to 'alert' your customers to special offers, seminars, articles and tips. This helps keep your customers 'engaged' with you.

In the next section you will see how to use texting as a powerful means to stay engaged with your customers.

To me, e-mail marketing is difficult. I cover it in more detail in Chapter 10, but due to low costs, and the great recession, people are turning to it more than ever. E-mail marketing hit its height in 2010 in the US and, according to mailermailer.com, that actually led to an overall decrease in open rates.<sup>viii</sup>

In fact, in France, the tech company Atos, which employs over 70,000 is looking to totally eradicate e-mail. Here is the article from ABC News of November 29, 2011.

*Employees of tech company Atos will be banned from sending emails under the company's new "zero email" policy.*

*CEO Thierry Breton of the French information technology company said only 10 percent of the 200 messages employees receive per day are useful and 18 percent is spam. That's why he hopes the company can eradicate internal emails in 18 months, forcing the company's 74,000 employees to communicate with each*

*other via instant messaging and a Facebook-style interface.*

*Caroline Crouch, a spokeswoman for the company, told ABC News the goal is focused on internal emails rather than external emails with clients and partners. Atos has already reduced the number of internal emails by 20 percent in six months.*

*When asked how employees have responded to the policy, Crouch told ABC News the overall response “has been positive with strong take up of alternative tools.”*

*Breton, the French finance minister from 2005 to 2007, told the Wall Street Journal he has not sent an email in the three years since he became chairman and CEO of Atos in November 2008.*

*“We are producing data on a massive scale that is fast polluting our working environments and also encroaching into our personal lives,” he said in a statement when first announcing the policy in February. “At [Atos] we are taking action now to reverse this trend, just as organizations took measures to reduce environmental pollution after the industrial revolution.”*

*Atos had revenue last year of EUR 8.6 billion, or \$11.5 billion, and has offices in 42 countries, according to the company website.*

*The company says by 2013, more than half of all new digital content will be the result of updates to, and editing of existing information. Middle managers spend more than 25 percent of their time searching for information, according to the company.*

*Crouch said Atos is evaluating a number of new tools to replace internal email including collaborative and social media tools. Those include the Atos Wiki, which allows all employees to communicate by contributing or modifying online content, and Office Communicator, the company's online chat system which allows video conferencing, and file and application sharing.<sup>ix</sup>*

Here is where the power of both your customer 'engagement' and profit is and where it blends beautifully with social media. Understanding that too much of SM is the 100 mile wide lake that is only an inch deep; yet, if using SM internally and with your customers, may make the lake only be a mile wide, but it will also be 100 miles deep – so deep

that no competitor will ever be able to penetrate that relationship. This is the powerful future of social media.

There is more than enough information out there on Social Media, but understand 3 things:

1. First; make sure it is strategic to your marketing plans otherwise it will be a big waste of time, and
2. Second; the jury is still out for C-level B-2-B marketing and sales, but
3. Third; use it for your customers to more fully engage with them and to get more sales and to keep them.

### **Mobile Applications:**

There are three major screens that people deal with every day: TV screen, Computer Screen; and Phone Screen. The tablet style, game style, movie style screens are all gaining in use and will be main stream in just a few years, and TV will continue to drop. The Wall Street Journal reported that TV viewing for ages 18 to 45 decreased by 15% over the last 5 years (September 21, 2011). The screen that is increasing the most is the smart phone screen.

Right now, a great way to capture your audience and then market back to them is via the smart phone by utilizing text messaging and QR.

The billboard pictured below has the QR code in it that takes a person with a smart phone right to the website or offer of Progressive Neuroscience.



These are different kinds of QR codes.



You can use your smart phone to scan it. QR stands for Quick Response and it was invented by Denso in Japan for Toyota back in 1995 to replace the standard bar code that you see on products because it can scan faster and from any angle. Toyota needed a faster scanner to scan auto parts as they went down the assembly line. The old barcode (below) was too slow.

What people are doing with these QR codes is phenomenal. Your smart phone has an app for this. One of the best apps that is on most phones is the Zebra Crossing Barcode Scanner – or just Zxing app on your phone. It's free.

So now, let's say you are in a bar and there is a theater of some type just a block away and you see the bar code on the bar napkins and you scan it with your phone. What you get is the trailer for the movie and free popcorn and \$3.00 off if you show up in the next 20 minutes (and bring the bar napkin). Then, when you go to the theater and get your discount and popcorn, they give you a coupon for a free drink at the bar when you return!

With QR codes people can get maps of where your store is if they see the QR code at a bus stop (being done in NYC right now for a furniture store). The transit systems can have a QR code so that you know when the next bus or train will

arrive! QR Codes, done right, will correctly take you to a website of the company's choosing or give a simple message.

For a \$5 Pizza delivered to your door hit 111-555-3344! Or for a Free Fries at McDonald's bring in your phone and show this to the clerk at the counter. Now, when that happens, McDonalds has your cell number and will be able to 'text' you to come into the store for a special offer. Text Message: "McDonalds 5<sup>th</sup> Ave location – free cheeseburger next 30 minutes! Hurry!"

This works!

And smart phones can do so much more. People can sign up for specials to pop up at participating restaurants and bars when they are 'in the area'. So a bar signs up for such a program and people with smart phones can download an app (and there are several out there) so that when they go out on the town a message pops up when they are within yards of a participating bar, "Come in and show your phone and get a free chicken wing appetizer with any drink!", or a message advertising a band or some special they are promoting.

### **Text Message Marketing:**

As good as the QR Code is, however, perhaps a better way to get the same result is Text Message Marketing. With text message marketing (TMM), you simple can text a

message or a web link to as many smart phones as you have on your list (once again, the list proves to be the most important element), which you do by making a great ‘offer’ to get their mobile phone number (again, the #2 most important element of the marketing campaign is the offer).

For example, a real estate company has a house for sale, and instead of those fliers that are on the front of the sign, that blow all over, and are oftentimes empty of the flier, you now say, ‘Text ‘House65’ to 12345 for details.’ So you text it, and within a minute you get back the URL link to the house with all the details and a photo gallery of all the rooms in the house.

Let’s take a look at the amazing statistics of this new way to engage your customers.

According to Search Point Marketing<sup>x</sup>

*The Mobile Market is Exploding!*

- *92% of US Adults Have a Cellular Line (Nielsen Mobile)*
- *96% of Cellular Lines in the US are Capable of Receiving SMS/Text Messages (Nielsen Mobile)*
- *2.5 Times as Many Users of “Texting” (3.2 Billion) than E-mail (1.3 Billion) Worldwide*

- *67% of All Mobile Users Would Like to Receive Reminders or Alerts (Jan. 2, 2010 Dialogue)*
- *55% of Americans Between 18 and 24 Years of Age Have Used a Mobile Phone to Aid in Their Shopping Process in the Last Year (Retrevo Research Group, Feb. 11, 2010)*
- *82% of Americans Do Not Leave the House Without Their Cell Phones (CTIA 2009)*
- *50% of 18 – 34 Year-olds Are Willing to Give Their Mobile Number in Exchange for Mobile Coupons (CTIA 2009)*

#### *Mobile Marketing Gets Results...*

- *99% of All Text Messages are Read*
- *90% of Text Messages are Read within 3 Minutes*
- *The Average Redemption Rate for Mobile Coupons is 20%*
- *Mobile Coupons Have a Redemption Rate 20 TIMES HIGHER than Paper Coupons*

So how do you get the list of cell phone numbers to test to? It's simple; you make a great offer. In retail circles, it is a lot easier and more appropriate to get cell numbers by giving

away free gifts of some type. In that, if you are a restaurant, you can give away a free appetizer – McDonalds can give away a free hamburger, etc. But if you are going after C-level executives, the odds are small that you are going to get their numbers up front – no matter what the offer is. So this is best used for forwarding articles, and videos of relevant product or news information that will help their customers. As Trust was our number 1 issue, you have to make sure you ONLY send them texts that do not violate the trust.

What will privacy laws dictate in the future with mobile marketing? Who knows? The power is that this is an ‘opt in’ medium and so it is not intrusive. The costs are typically about 5 to 10 cents per text. At this point, this is ‘worth it’.

### **iPad and Tablets:**

Ok – I am going to cheat here, but it is because I found an article which articulates how to massage your message for tablets. It is from Limelight Networks.

<http://www.limelight.com/><sup>xi</sup> And the article is called, ‘3 Ways To Make Your Site More Tablet Worthy’. Quoted:

## It's Time to Take Tablets Seriously

Apple launched its first iPad more than a year ago, and since then the tablet platform has taken off. One forecast by analysts at Goldman Sachs predicts that **twenty-one million people will buy a tablet in 2011 rather than a laptop**, and according to Nielsen, **nearly five percent of the US population already owns one**. However, despite the success of these large-screen mobile devices, many web designers and marketing professionals have yet to take advantage of the new medium. Complicating factors like the lack of Flash support and the need to design for a touch screen have held companies back from realizing their tablet potential. These may seem like tough technical and workflow issues, but they are irrelevant to consumers. Consumers take their tablets everywhere and increasingly expect them to substitute for traditional computers. Browser use is quite high on tablets, with **users turning to browsers nearly forty percent of the time**, according to mobile analytics firm Zokum. Site performance is critical. Sites that don't perform well are abandoned, while sites that do perform well open themselves up to the rewarding possibility of being explored, bookmarked, and shared. Here are three tips to consider for your marketing strategy—and for creating your own tablet-worthy site.

### Tip #1 – Treat the Tablet Like a High-End Media Experience

Tablets offer a highly visual mobile platform both because of their larger screens and their higher-resolution displays. In light of this, professional media producers have started to take advantage of tablets as a new delivery channel. The original lack of video content for iPads has been replaced by a wide selection of content that people are paying money to watch. Netflix and HBO offer two good examples in the app department, and while the number of Netflix iPad downloads is unknown, [the HBO GO iPad app reportedly generated one million downloads in its first week](#) of availability. The wide variety of popular, professionally produced content available now on the iPad means marketers are competing for consumer attention with some high-quality media options. You may not think your mobile website should have to stack up against HBO's *The Wire*, but in one sense, it does. There's only so much time in a day, and consumers will choose to spend it on the experiences that prove to be the most satisfying. If your website doesn't entertain and/or inform effectively, consumers will find it easy to switch over to tablet TV. After all, it only takes a few screen taps to tune in. Some companies have begun to recognize the importance of catering to a media-savvy tablet audience, and are reacting accordingly. The outdoorlifestyle and sporting goods company Quiksilver is one such example.

### Example: Quiksilver's Original Lifestyle Content

Headquartered in the United States but operating as a global business, [Quiksilver](#) is an outdoor gear retailer

that has created a site that relies heavily on original content and multimedia entertainment. The site includes video news, rough-cut documentaries, photos, contests, a daily blog, and even Quiksilver music mixes. The goal isn't to create media for media's sake. Quiksilver designs its content around the surfers, skaters, and snowboarders who make its outdoor gear popular. The people it targets are consumers who live, or aspire to live, an athletic lifestyle.

On the iPad, the overwhelming majority of Quiksilver's content is not only accessible, but also beautifully executed for tablet use. **Videos load quickly, and images render in highresolution.** The site is neatly designed so that users can jump around to different sections depending on whether they want to shop, browse content on top athletes and sporting events, or do a little of both. It's not showing full-length movies, but Quiksilver is offering entertainment as part of a marketing experience. The fact that it's iPad-friendly means consumers can enjoy and make the most of that experience anywhere they go.

## Tip #2 – Support Unique Tablet Behaviors

There are several characteristics that make using a tablet different from using a PC or smartphone. Beyond screen size and mobility, a tablet is the ultimate touch-screen device, and it has the advantage of operating in either landscape or portrait mode. For the touch-screen factor, the best sites are the ones

that enable interactions through tapping, pinching, and sliding. These motions are highly intuitive, and when they don't generate the expected response for tablet users, the result is frustrating. For example, high-resolution images beg to be enlarged with a quick multi-touch gesture. The combination of a beautiful screen display and the ease of zooming in on a picture with your fingers makes tablet-optimized images particularly satisfying. The converse is also true, however. Without the ability to zoom in on details, consumers lose one of the big benefits of tablet web browsing, and websites lose a little of their luster. The landscape and portrait viewing options for tablets create an interesting opportunity for website designers. A lot of content is best viewed in landscape mode, particularly multimedia content. However, other material may be preferable in portrait mode. The good news is that website managers can optimize different pages depending on how consumers interact with them. Smart marketers will continue fine-tuning content presentation as more usage and preference data is collected from the growing base of tablet users.

### Example: White Collar's HTML5 Experience for The New York Times

The New York Times has been in the race toward tablet optimization, with both an iPad app and an HTML5 mobile site. And because of its early moves in the space, the newspaper has been an excellent testing ground for new content designs and production experiments. One example of iPad experimentation

through The New York Times is an ad that was produced recently for the publication's HTML5 website to promote the television show *White Collar*. Timed for the return of new *White Collar* episodes, the ad focused on generating user engagement through touch-screen interaction. Users were encouraged to move an interactive panel from the ad around the full newspaper page to scan for embedded "clues" and to unlock bonus video content from the show. It was a "touch to play" HTML5 experience, and it was geared specifically for the iPad. In addition to enabling touch-screen interaction, the *White Collar* ad was also developed to record user responses on a tablet. The ad collected data on which panels users chose to engage with, and whether they viewed content in landscape or portrait mode. Through analysis of those results, the advertising agency had the opportunity to refine the ad based on iPad-specific user behavior.

### Tip #3 – Turn Users into Contributors

One of the most interesting things about mobile devices is how they can be used to generate content. First-generation iPads lacked a camera function, but that's been rectified with the iPad 2, and with a variety of other tablets launching in 2011. Considering the presence of a camera, audio recording capabilities, and a mobile broadband connection, the potential for tablets to be used by consumers as multimedia content creation and publishing devices is huge. Some users are taking advantage of these tablet capabilities, and marketers have the

opportunity to find ways to leverage this user-generated content. Given that marketers prefer engaged consumers over passive ones, there should be a rush to get users involved in online activities that entertain or inform while also delivering a branded message. This is the next generation of web marketing. Companies are increasingly fostering user engagement across social networking platforms, but they're still a step behind when it comes to the mobile web. As a result, examples of mobile websites that leverage user-generated content for marketing are few and far between, even though tablets offer new potential for this kind of engagement. Here are some ideas for possible future website initiatives designed with tablets in mind.

### Ideas for Getting Tablet Users to Contribute Content

**1. Encourage User Design**– Allow users to submit their own photos, and provide tools for them to paste those images into a virtual setting. This type of application works well for a number of scenarios, including home decorating and home renovation. Similar applications already appear on home and DIY television shows, and the approach easily transfers to the mobile web on a tablet device.

**Tablet Advantage:** The high-resolution, touch-screen interface on a tablet makes it the perfect canvas for design.

**2. Build an Interactive Itinerary**– Convey the experience of any location with an interactive web application. Give consumers a flavor of what they might experience at a particular location by allowing them to select and arrange by touch different

elements including photos, videos, maps, animations, and more. Allow them to create an interactive itinerary, and then share it with others online.

**Tablet Advantage:** Tablets are built for media consumption, and can be used to create a unique, immersive experience on the go.

**3. Create Custom Comic Strips**– Give users a choice of short comic strips that highlight brand attributes of your product or service. Ask them to upload their own photos (which can be taken on the spot), run those photos through a special effects filter, and output customized comic strip versions that users can view on their tablets and share with friends.

**Tablet Advantage:** The large-screen, high-resolution display on a tablet makes comic strips easier and more enjoyable to view on the go.

**4. Offer Personalized Celebrity Greetings**– Remember the Old Spice man? In the wake of that fantastically successful television campaign, one enterprising website provided personalized voicemail messages using phrases from the commercials and inserting users' individual phone numbers. Consider using a similar tactic, but give users the opportunity to upload their own audio, and refine the final result with a touch-screen audio editor.

**Tablet Advantage:** Audio editing is possible on a smartphone, but much easier to manage with the screen real estate available on a tablet.

**5. Host a Video Contest**– Numerous brands have hosted video contests on their websites, but the opportunities available with tablet devices give this old idea new life. Have users capture and upload their own video straight from a tablet, and then give them the tools to add branded content, special effects, transitions, and more.

**Tablet Advantage:**The embedded camera and larger screen space available on tablet devices makes them ideal for video production as well as consumption.

## The Tablet and Beyond

Tablets represent a major shift in content consumption and one that marketing professionals can't afford to ignore. They are highly visual, introduce new user behaviors, and support increased interactivity. These characteristics all lead to new opportunities, and brands that leverage them effectively to create tablet-worthy sites will find new audiences—and a more engaged set of consumers.

Limelight Networks can help you implement a tablet-worthy site. Limelight Networks offers video platform and site acceleration services designed for mobile marketing professionals. For information on our solutions, visit our [LimelightREACH](#), [Limelight Video Platform](#) and [Website Acceleration](#) pages online, or [contact our sales team](#). <http://www.limelight.com/contact>.

There is a recent emergence of Groupon or New Media Deals and others, and all the coupon targeted messages based on your social media, web, or smart phone applications. If you are not participating in this arena as a retailer then you are missing the boat! And for business to business, the QR Codes or text message number at the bottom of a print ad or print brochure can take the prospect right to a demo video, white paper, spec sheet, or anywhere else on the web they want them to go to.

Every week you can search google and find new stories on new ways to use this technology to find new customers. This is mobile technology; it is growing, and it's not going away.

For your sales and marketing it is important to use an integrated approach to reach the target audience, so as good and strong as mobile marketing is, it is not the end-all be all form of marketing to help you generate leads.

### **Video.**

One of the most important elements of sales and marketing today is through video. YouTube is the #2 Search Engine behind Google. People love video because it's easier for them. The world of written material is dying – look at the death of newspapers. People's minds are too overloaded

today to be able to focus on the written word. And video gives a different, emotional element that is tough to do in books. Video gives sound and sight in addition to the message. It is a powerful medium.

Use video on your website and even for delivering a 30 second or 60 second sales message, which you can text to someone or place as a QR code on a flyer. People will gladly listen to a 30 second video via a text message or a QR code over going to your website, since odds are great that they will have their mobile device with them over their PC (are you reading this book on a Kindle, Nook, Smart Phone, or a Tablet?).



## Chapter 5:

### Positioning and Your Expertise

No matter who you are, you are an expert in something related to your business. Your profitability is directly related to how well you let others know that and use it for their value or gain. Don't come across as cocky, snobby, or anything like that; just come across as confident. Expertise is where the dollars are, and here is the analogy.

Let's say it is time for your annual physical and you grumble a bit because it is \$50 out of your pocket and it is going to take up half the day. You come in, sign in, and wait. You are then escorted back and you are weighed and all that,

then they take you to another room and your blood is drawn. You are then taken to the exam room and you strip down and you have one of those gowns where your butt sticks out and you wait and wait. Finally a doc walks in, curtly says hello, but keeps looking down at some papers and finally she says,

‘So, tell me, Matt. Have you ever had a family history of heart disease?’

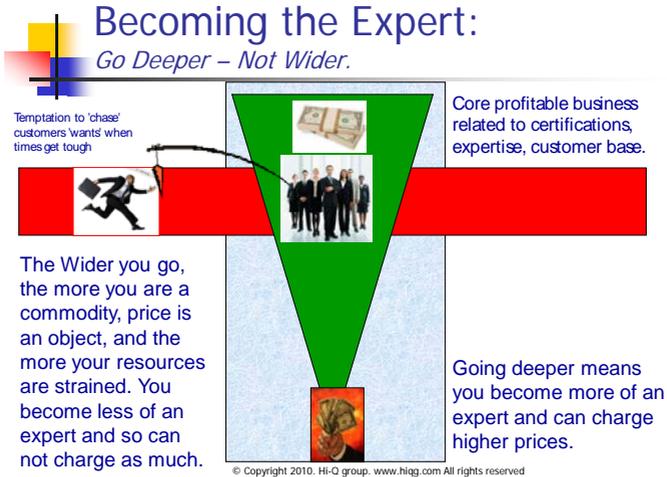
Whoa!! Warning lights are flashing and you are all anxious and now that \$50 doesn’t mean a thing. You will pay anything to make sure your heart is ok. You find the best hear surgeon and you are all taken care of and it was worth every penny! This is your business. If you are an expert in something, people will pay more for it, especially in today’s economy where ‘reducing risk’ is one of the top activities of CFOs. When you hire an expert, you reduce your risk over hiring a generalist. Many people think that they need to reduce their rates during tough times like this, when the opposite is true.

If you have a heart problem, you won’t go back to the generalist doctor, you will go to the best cardiologist you can find. That cardiologist will be making a lot more money than the generalist will ever make.

When the economy is bad, you want to become more of an expert and raise your fees because people can’t afford

mistakes. Therefore, people want to know that when they get a product or service from you, that it won't mess up. For that, especially today, they will pay more.

Hi-Q-group



The slide above shows that as you go 'wider' - chasing to get any business that you are not an expert in – that you have to compete on price and you therefore become a commodity. The dollars are in depth and narrowed focus.

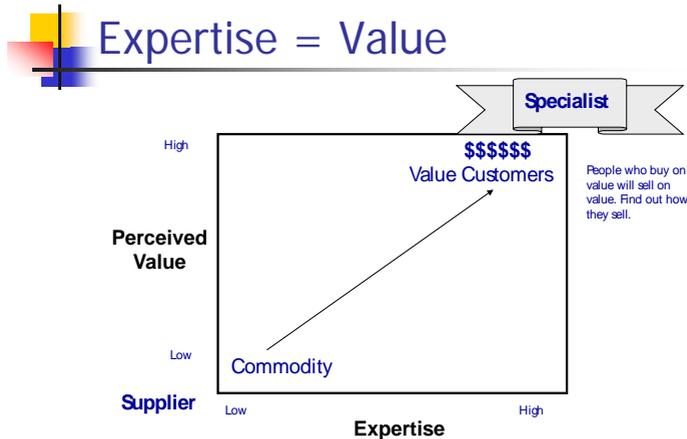
The next slide illustrates this nicely with a story I found in my local, Cleveland Plain Dealer in September of 2009. It is a story of two brothers. The older brother started a landscape architect business and was really talented at



clients, work less hours, are doing what they enjoy and they ‘HAVE SEEN PROFITS RISE 70%’! They achieved all this by going deeper and not wider; and by going to ‘the right list.’ One of the most profitable words you can ever use is, ‘No.’ When someone asks, “Hey can you just do this?” If it is not what your expertise is all about then it will take away from your profits and take away your ‘positioning’ as an expert. You must be willing to walk away from work that is not in your core expertise if you ever want to become wealthy and successful.

Understand that you must marry expertise with deliverable value. This diagram demonstrates this.

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On the y axis is your ‘Perceived Value’ and the x axis is your perceived or real expertise. You can have a person with high perceived value but no expertise; front desk receptionist comes to mind. This person has a high value in greeting people correctly when they walk in the door and how she greets them is important because it sets the company image.

On the other hand you could have a person with a high degree of expertise but of little value. A computer programmer comes to mind. There seem to be a million of these guys, and each one is good, but there are a lot of them, and so the value that one brings is not worth much.

If you are a specialist with high expertise and high value – the cardiologist, then you are worth a lot of money and people will pay for that expertise.

### **Repeatable Solution:**

Once you become an expert and you have an ‘expert process’ to solve a problem of value, then you become even more profitable. You want to find a repeatable solution for three reasons.

First, you want to have a consistent customer experience. I know that if I go to a McDonald’s in California or in Cleveland that I am going to get the same quality meal. That is what good branding is, too, by the way. You can’t have a

good brand if you can't deliver a good, consistent product or good consistent experience to the customer.

Second, as you become more efficient in the process, your costs of doing business go down. Now you will have more case studies and successes to refer to, and you can charge even more money, so that your overall profits will go up.

Last, having a repeatable process allows your business to be sellable. Even if you don't want to sell it, having it be sellable will make you more profitable.

## Positioning:

Positioning is defined by as 'where something parks in your brain'. So, to the slide below, if I say, 'McDonald's' and then I say 'Morton's' they both will park in a different spot in your brain.



They both tout quality, they both sell beef (maybe even from the same cow), but clearly they both park in a different spot in your brain. And both McDonald's and Morton's WANTS to park in a different spot in your brain. The main point about positioning is that you control it totally (unless there is a huge negative PR issue that comes up – but in the end, you control that, too).

One thing I do with my clients is I have them go through an exercise I call the PDQ'S. This is an exercise where they rank, by priority, how they want the world to think of them. There are seven items that determine the PDQ'S and they are:

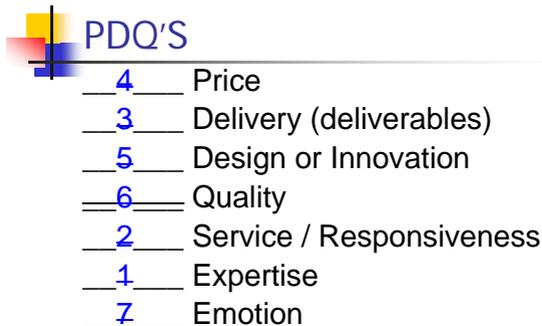
- Price
- Delivery
- Design or Innovation
- Quality
- Service
- Expertise
- Emotion

I have them rank them from 1 to 7 where 1 is the most important item they want the customer to see them as when they hear their name. Many of these points are obvious, but a few always bring up questions; 'What do you mean by emotion?' When we put down emotion, there are two

examples that come to mind. First, I had one owner tell me, “I want my customers to feel good about working with me.” And the other emotion might be that of an insurance agency “Who will take care of your children if you die?”, or for Disaster Recovery – “Where will your business be if the power goes out?” For Design or Innovation, that one gets some questions, too, but for an ad agency who touts creativity; this is a no-brainer. The last one that sometimes gets some questions is delivery. Delivery can be just as simple as it says, ‘how quickly something is delivered’, or it can be the ‘deliverables’ the company provides for its clients.

Below is an example.

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Total among all in the room, and take the top three answers. That forms the basis of your 'positioning statement' For example: *"Experts Delivering You Quality Solutions"*

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In this example, the business owner put Expertise, Service, and Delivery as her top three issues. And so if the business is SAP Application Development, then they want



**Everybody's Unique In Something**

Words to use: ' . . . est' words – and tie to your Sweet Spot Industries / Geo.

*"The Largest Provider of Websphere Applications to the Garment Industry in the Chicagoland Area."*

<b>First</b>	<b>Best</b>	<b>Only</b>	<b>Largest</b>
<b>Most</b>	<b>Quickest</b>		
<b>Oldest</b>	<b>Newest</b>	<b>Slowest</b>	
<b>Widest</b>	<b>#1</b>	<b>Last</b>	

their customers to look at them as the Experts in SAP AD, with superior service and great delivery. This is good. Conversely, the last thing they want the customer to think of when they think of them is anything emotional and quality – who knows why.

When this company is putting their advertising, slogans, and collateral material together, they know what to put as a priority: Expertise, Service, and Delivery.

## USP

Positioning does not go far enough, as any other company could make the exact same claims. For this reason, we revert

back to your ‘expertise’ and we put in the – Unique Selling Proposition. What makes you, or your business, **TOTALLY** unique? Oftentimes this is combined with the expertise that was discussed above. To find out the USP I tell my clients to find an ‘...est’ word that describes them.

- Longest
- Newest
- Oldest
- First
- Last
- Widest
- Cheapest
- Most Experienced
- Largest
- Smallest

An ‘...est’ word is final. It is the extreme and no one can go higher, lower, wider or narrow than that and so it makes you totally unique. HR block, for example touts themselves as ‘The World’s Largest Tax Firm’.

## USP



# Unique Selling Proposition

## One Sentence That is Unique to YOU.



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Finding your USP and your ‘...est’ word will help you ‘Position’ yourself in the business world. Many marketers work to determine what their competitors are doing and position themselves against that. By finding your expertise and your USP what you are essentially doing is ELIMINATING competition. My 13 year old daughter was talking to me last night about my work and she asked me who my competition was. “Hopefully, no one,” I replied. Hopefully my Lead Generation and Business Growth model is totally unique so that others are chasing Hi-Q group and not the other way around.

### **Craft the Message:**

Crafting your message, now, becomes very specific to your industry and what you are an expert and unique at. From this unique messaging, companies will craft USPs and tag lines based on their expertise in an industry, so one solution may have five tag lines if they are in five industries. The idea is to make your message as targeted and niched as possible and to make sure you build up on your uniqueness and expertise – this is very similar to messaging and EcoSites as discussed in Chapter 5.

### **Sell on Process not on Features**

A friend of mine is an HR Director of a large packaging corporation. His competitor is 3M. He asked me one day, who is Ford's competition in Cleveland? I told him it was probably GM or Honda. Then he asked, "Ok, who is Ford's competition in New York City?" I stumbled and didn't get it right. "It's the subway and taxi's," he said. Then he went on, "Let me tell you what happened to us recently. We were doing just fine in selling our boxing machines to all these factories and we were beating 3M all over the place. And then, one month we noticed our orders dropped dramatically. And so we did some research and found out that everyone was getting 3M machines!. When we dug further, we found out that 3M was 'giving away' the machines for free as long as the companies bought the glue and tape from 3M."

The ‘PROCESS’ was the competition here, and not the product. Try and set your ‘process’ up so that you have no competition.



**Who's Your Competition?**  
Process is worse than Product.

 Cleveland  
New York City

 Free 3M  
Boxing  
Machine **3M**



## **Chapter 6:**

### **Sales and How to**

### **Talk To a C-level Executive**

We defined who we are going after via the lists and database profiling, and we created our unique, ‘expert’ positioning, and we have seen how to get a response from some methods (customer satisfaction survey); it’s important to focus on how we get to and talk to the C-level executive.

**The Time To Sales Equation:**

Science and numbers may be fascinating to some and not you, but here is a simple equation that deals with the time it takes to close a sale. The faster you can make sales, the better off you, and everyone else will be. Here is the formula:

$$\text{Time To Close A Sale} = \frac{\text{Risk} \times \text{Cost} \times \# \text{ People} \times \text{Time} \times \text{Politics}}{\text{Pain (needs)} \times \text{ROI} \times \text{Trust} \times \text{Agility} \times \text{Relationships}}$$

It’s important to understand these points and what to do with them. Everything in the numerator must be reduced, and everything in the denominator must be increased. Putting specific numbers to each of these variables is too great a challenge. Here is what you need to know: lower the top, raise the bottom to be successful. By putting representative numbers to each variable, and then just change each number by 10%, you will see the dramatic difference.

For example, let’s put a ‘3’ for each number, which means that the Time to Close a Sale (TCS) = 1.

$$\text{TCS} = \frac{3 \times 3 \times 3 \times 3 \times 3}{3 \times 3 \times 3 \times 3 \times 3} = \frac{243}{243} = 1.00$$

Decreasing each factor in the numerator by 10% and increasing each factor in the denominator by 10% makes a dramatic difference.

2.7	2.7	2.7	2.7	2.7		
					=	0.37
3.3	3.3	3.3	3.3	3.3		

What we see is that the ‘Time To Sale’ went from 1.00 to 0.37. In other words, by making this 10% change across the board, the time to sale was cut by about two thirds!! The numbers are arbitrary, but the concept is sound! The equation gets more complicated if you were to add more factors in either the numerator or the denominator, which is exactly what happens in real life.

For example, if your competitor is one block away and you are across the country, then there needs to be a ‘distance’ factor in the numerator, and as equally there needs to be a ‘responsiveness’ factor in the denominator. And there are more factors, too. Whatever the factors are, you need to know where to put them (if they hurt your cause, they go in the numerator, and if they help your cause, they go in the denominator).

The equation is broken down like this.

## **On the Numerator Side:**

**Risk:** This is the risk that the customer has to take to take to bring you on. A research firm did a study for IBM and Arrow electronics (the main distributor for IBM) back in 2009 (deep into the Great Recession) to the top 500 CFOs and CEOs in the U.S. as to what their top issues were during the Great Recession. The top 3 answers were;

#1 – Improve Customer Service (you don't want to lose any customers in a down economy);

# 2 – Reduce Costs (of course); and

# 3 – Reduce Risk. Reducing or eliminating risk is what companies, corporations, board members and all C-level executives are focusing on these days. If reducing risk is not one of your key elements in your sales and marketing, then you are missing the boat. Brian Tracey talks about the more you can reduce risk the more you can charge for your services.

**Cost:** This is a no brainer. If your product or service costs a lot, then it is a bigger factor than if it is free. Cost always goes in the numerator unless it is free, then it goes in the denominator.

**Time:** How many times have you had deals that are 'sealed' and then the customer says, 'We're all set, but we are going to

wait until Jill comes back from maternity leave and then we will begin.” So you are optimistic, but cautious, and then what happens? Two days before you are scheduled to start, out of the blue, there is a data security breach and your client is in all the headlines and you get a call saying, ‘Well, gee, Matt, I am sorry, no-one saw this coming, but we have got to put the project on hold until the dust settles.’” These things happen all the time. So the longer the deal takes to close, then the lower your odds of making it happen.

**The Number of People.** Let’s face facts; people muck up deals, which reminds us of the expression, ‘If it weren’t for customers my business would be great!’. Therefore, the more people there are that get involved in a sale, the greater the odds are that it will go south or at least take a lot longer to close. The longer it takes to close (as noted above), the greater the odds are it won’t happen. You must find out who ALL the players are in the buying decision process, and get to them fast if you want to close that deal and move on.

**Politics:** If the competitor is the owner’s son, or if someone is sleeping with someone, or has something over on someone else in the company, then you are out of luck if it is a big enough factor. This is an area that frustrates more sales

people than most anything else, and there is really nothing one can do about it (and maintain any sense of a moral code). Make sure you talk to the ‘lower staff’ to understand the inside politics of what is ‘really’ going on.

### **On the Denominator Side:**

**Pain:** How much pain is the client in who needs your product or service? The more they need you, then the greater the odds of closing the deal. Your job is to bring to light the pain and all its ramifications as much as possible. No Pain, No Gain. How true that is. On the other hand, don’t get caught up in some sales courses that are ONLY focused on the pain. Some companies just want to stay ahead of the competition, or start a new product line, or just see an opportunity that has a small window. It’s not always pain, but look for that element if you can.

**ROI:** Return on investment is more important than ever today, and, according to a study done by IBM and Arrow Electronics that Lapis Business Solutions conducted in 2009, it needs to be within 9 months, whereas before 2008, it was ok to go as long as 18 months or even three years for an ROI. You want to increase the ROI as big and as fast (time again) as possible to increase the odds of the sale and decrease the time to sale.

**Trust:** We spoke of Trust in Chapter 1, but suffice it to say, that if the customer doesn't trust you, regardless of your price and delivery, then you won't get the order. The opposite is true, as well, the more they trust you, then the less the price and delivery matters in terms of making the sale. Trust is a function of Results, Competency, Insight, Relationships and Character: Build up that five-sided diamond.

**Agility:** Agility is reactionary speed. Now, we talk about 'time' in the numerator and this is directly tied to the speed or time it takes to close the deal. But the factor that most influences speed or time is your ability to be agile to the customer's needs, desires, pricing, and options. If you are inflexible, then your odds decrease in making the sale quickly and if you're agile, then your odds are much improved.

### **What all companies are looking for: Agility.**

From 2006 to 2009, Gartner did a study and wrote a white paper on how successful businesses progress. It is simple and enlightening. According to Gartner, all businesses go through four phases of growth.

1. From Disorganized to
2. Reactive to
3. Proactive, and finally to
4. Agile

IT Spending Justification for Midmarket Firms

Strategic Planning Assumption: Through 2006, 80 percent of midsize businesses will be either disorganized or reactive and will inhibit their progression due to lack of governance (0.7 probability).



Agility is what all good companies strive for. They strive for it as an organization and they strive for it within each department and sub-department.

In business, what is agility? It is nothing more than being able to ‘correctly’ and soundly respond to customer and market demands with speed and clarity to continue to deliver a consistently positive customer experience. The companies that are more agile will win more market share. In addition to

that, years ago, my firm conducted a survey for National City Bank in Cleveland, Ohio to small business owners to ask them what they wanted out of their bank: Easier terms, lower rates, free services, etc. The number one answer that came back over all others was ‘*Responsiveness*’. Responsiveness and agility are one and the same to all customers. Make sure you understand that the more you can be responsive and agile to your customers, or prospective customers, the more valuable you will be to them and the more successful you will be.

**Relationship:** If someone at another company, who is trusted or respected, recommends you for work, then you are good to go. If you have a personal relationship with the president or the members of the Board, you are also good to go. Relationships on this side are just as positively powerful and politics is negatively powerful on the numerator side of this equation.

## **How to Talk to a C-Level Person**

Whether it is the Chief Financial Officer (CFO), the Chief Executive Officer (CEO), The Chief Security Officer (CSO), The Chief Information Officer (CIO), The Chief Operating

Officer (COO), The Chief Process Officer (CPO), etc., these executives are the final decision makers. You need to know how to get to them and talk to them if you want to grow your business.

The reason why it is important is because of what has happened since the great recession began. C-level people get



involved early in a strategic process, and then disappear while the mid-managers get the details worked out, and then come back at the end.

This means that if you want to be involved in the buying process, that you have to engage with them early, fight through the mid-management issues of feeds and speeds, and delivery, and then remain standing when the C-level person

re-enters the room. Some salespeople engage when it is too late – on the far right of the chart; and that is when the RFP goes out. But in order to be in the room in the first place, and have the RFP be written for your advantage, you have to get to the C-level early, and have her recommend you to their team for you to stay in the room.

Many sales people think that they know how to talk to a C-level, and many seasoned sales people truly do know what they are talking about. Experience shows, however, that few people really understand what it takes. Oftentimes they are too loose and unprofessional, or on the other side, many salespeople are uncomfortable and feel awkward. Or they have a sort of ‘superiority’ attitude about themselves, *“What does this stuffed shirt know about this? I invented it and she doesn’t know anything.”*

Many small business owners are ‘specialists’ in their area and are not strategists, and being able to talk strategically is half what it takes to be able to correctly talk to a C-level executive; Strategy Discussions. The other half is the ‘tactical’ which will be discussed shortly.

Understand, however, there is no ‘formula’ for getting that CIO or CEO mesmerized by your silver tongue. But you should know the things that ‘most’ C-level executives respond to, and to understand how they think and what they

focus on. Secondly, it is very important to listen to ‘how’ they use words; and that too will be addressed shortly.

Of course, C-level executives do think about dollars and business operations, and you can’t ignore those elements of the conversation. After all, business is about profit. What is very important to understand is that few C-levels just want some bright guy or gal talking to them about what they ‘should’ do. They can get books or articles on that. You need to be a tactical problem solver; in other words you have to ‘do something’ for the company in order to be listened to. But there are five other guys and gals out there who can also ‘do’ what you do in some form or another, and this is where being a ‘strategical’ trusted advisor will set you apart from the other tactical suppliers.

What drives better ‘tactical’ discussions with you versus your competition are higher, more strategic based issues, as well as more personal drive issues. As the business author, Steve Martin (not the talented comedian and banjo player) says, “The ultimate goal for the C-level meeting is simple: you want the executive to expose his internal dialogue to you.

“You want him to honestly explain what he is trying to accomplish and why he is doing it from a business and, more importantly, personal standpoint.”<sup>xii</sup>

There are several things to focus on here to get to the ‘internal dialogue’ as we go through this all important part of growing your business. Focusing on features and benefits will get you to a limited place with a C-level exec. The 9 things you have to focus on are:

1. Your confidence and an interactive style.
2. Rapport and Mannerisms – how they sit and the pace of their conversation
3. Her or his strategic initiatives and the five business issues – being a Trusted Advisor
4. Your insight and wisdom into industry trends
5. Her or his beliefs and issues of importance
6. What end result you will produce for him / her and for the company.
7. Her or his personal goals and personal feelings
8. How he or she communicate (auditory, visual, or kinesthetic)
9. Options and Control

If you speak to other sales educators or read other books, you will undoubtedly discover a different set of 10 criteria to follow. Go ahead and read those books, they are all good, but here are the top 10 things you have to in dealing with the top thinking executives. It should be noted here, to say that there

is an overriding premise to follow when dealing with these individuals. The premise is that they are good, kind people.

They are always looking for good people to share. They got to where they are because they have helped people. If you go in with that attitude, you will come out with a new friend. So with that in mind, here are the ten things to focus on.

### **#1 – Your confidence.**

This first because here is the bottom line: No matter what else you know, or who you know, or what you know about them, and no matter what your offer is, **IF YOU DON'T COME ACROSS WITH CONFIDENCE YOU WILL NOT MOVE ONE INCH WITH ANY C-LEVEL EXECUTIVE.** It doesn't matter how many sales classes you take, or how many other books you read on sales, or what 'techniques' you may learn, if you don't have confidence, then you are not going to be successful. Confidence is not cockiness. No-one like a cocky person; especially C-level executives. Executives are a bit lonely and they are looking and wanting someone who is on par with them. They want to interact with someone who is their equal, which, of course, makes sense. So how does one get to be more confident?

Confidence comes from two things:

1. Knowledge and
2. Practice (or experience).

The more you know about your offerings and about their business and their industry, and the more you talk about it with others, the more confident you will get. This confidence will get you success more than anything else and that will lead to more confidence which, in turn, will lead to more success. When you hear about athletes who are in a slump and they want to get out of it, what is it that they talk about? They talk about ‘Gaining their confidence back.’ When reporters talk to new NFL rookies, what is the one thing almost all of them say? *“I have confidence that I can play at this level.”* In order to be successful you MUST have confidence.

So when you walk into the C-level suite, make sure you walk in like you have been in a million other executive corner offices. Don’t over exclaim on how nice it is or how great the view is. You expect it to be great and nice. As well, don’t look around the room too much; after all, you’ve seen these offices before. A person who is cocky thinks that there is nothing more to learn, and a person who is confident knows that he or she has seen an awful lot, but that there is much more to see and learn and odds are great that the person you are meeting with feels the same way.

Now, to be fair, you are going to run into some executives who think they know it all – they are cocky, or at least they are going to act like they know it all. You have two choices here; one, try and show them the error of their ways in nice and clever questioning, or cut your losses and move on. My advice is to cut your losses and move on to someone who will treat you like an equal. (‘Don’t case pearls before the swine’ Mt 7:16).

**# 2- Rapport and Mannerisms(DISC):** How they sit and the pace of their conversation. This flows right from # 1 and your confidence. Rapport and Mannerism doesn’t mean that when you see a picture of a boy in a football uniform that you start talking about that executive’s son and his football exploits (but you could). Some small chatter is good, but the purpose of the small chatter is to learn *how* they talk and sit. For example, if you see that the executive talks fast and leans forward and keeps her eyes honed right to yours, then you want to talk fast, lean forward and burn your eyes right back at her. In neurolinguistic programming language, that is called rapport. This is not the rapport that we are used to hearing about. We think of social commonalities as rapport; things like sports, and vacations, weather, and church or social groups, etc. But for psychologists who study body

language, rapport is ‘mimicking’ the speaking and posturing mannerisms of another person.

There are several personality and trait type identifiers out there and Myers-Briggs is perhaps one of the most popular ones. There are others and most of them are good, but one called The DISC method is very solid. DISC stands for the four personality traits, for business, that we all have and how strong or weak you are in these four typically defines your speaking style and your job.

The DISC method grew out of pioneering behavioral psychology work developed by Dr. William Molten Marston (May 9, 1893 – May 2, 1947) in 1928. According to Wikipedia, DISC is defined as:

-----  
*The assessments classify four aspects of behavior by testing a person's preferences in word associations.*

*DISC is an acronym for:*

- *Dominance – relating to control, power and assertiveness*
- *Influence – relating to social situations and communication*
- *Steadiness (submission in Marston's time) – relating to patience, persistence, and thoughtfulness*

- *Compliance (or caution, compliance in Marston's time) – relating to structure and organization*<sup>[2]</sup>

*These four dimensions can be grouped in a grid with "D" and "I" sharing the top row and representing extroverted aspects of the personality, and "C" and "S" below representing introverted aspects. "D" and "C" then share the left column and represent task-focused aspects, and "I" and "S" share the right column and represent social aspects. In this [matrix](#), the vertical dimension represents a factor of "Assertive" or "Passive", while the horizontal dimension represents "Open" vs. "Guarded".*<sup>[3]</sup>

- **Dominance:** *People who score high in the intensity of the "D" styles factor are very active in dealing with problems and challenges, while low "D" scores are people who want to do more research before committing to a decision. High "D" people are described as demanding, forceful, egocentric, strong willed, driving, determined, ambitious, aggressive, and pioneering. Low D scores describe those who are conservative, low keyed, cooperative, calculating, undemanding, cautious, mild, agreeable, modest and peaceful.*

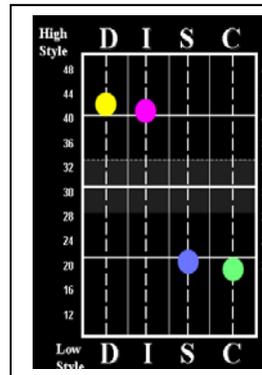
- ***Influence:*** People with high "I" scores influence others through talking and activity and tend to be emotional. They are described as convincing, magnetic, political, enthusiastic, persuasive, warm, demonstrative, trusting, and optimistic. Those with low "I" scores influence more by data and facts, and not with feelings. They are described as reflective, factual, calculating, skeptical, logical, suspicious, matter of fact, pessimistic, and critical.
- ***Steadiness:*** People with high "S" styles scores want a steady pace, security, and do not like sudden change. High "S" individuals are calm, relaxed, patient, possessive, predictable, deliberate, stable, consistent, and tend to be unemotional and poker faced. Low "S" intensity scores are those who like change and variety. People with low "S" scores are described as restless, demonstrative, impatient, eager, or even impulsive.
- ***Compliance:*** People with high "C" styles adhere to rules, regulations, and structure. They like to do quality work and do it right the first time. High "C" people are careful, cautious, exacting, neat, systematic, diplomatic, accurate, and tactful. Those with low "C" scores challenge the rules and want

*independence and are described as self-willed, stubborn, opinionated, unsystematic, arbitrary, and unconcerned with details.*<sup>xiii</sup>

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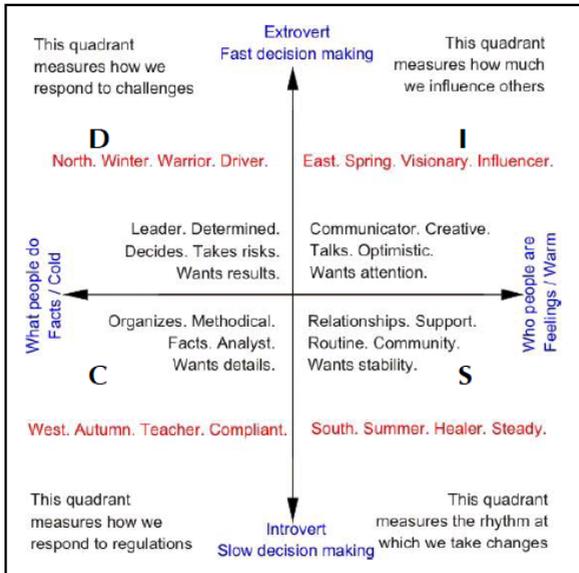
When one completes a DISC ‘test’, a graphic analysis is produced; like the one below. This shows that this person is very high in the ‘D’ and in the ‘I’ categories and low in the ‘S’ and ‘C’ categories.

People who are high D and I are leaders and risk takers. They are somewhat restless. People who are high S and C are more ‘measured’, steadfast and will be more tolerant. I am a high D and a high I – that makes sense. I have taken the D.I.S. C. profile



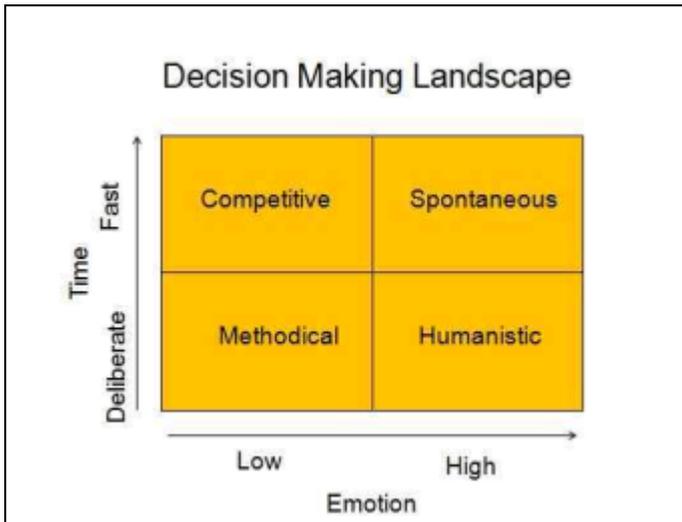
several times and each time it has come out the same. I trust it.

This diagram, and the one on the next page, was taken from the website of



<http://www.skills2lead.com/disc-personality-test.html> and it shows the different personality types of the different categories. So what, you may say. Certainly you can't do a DISC analysis of your prospects. No, but a further understanding of DISC will help you see and understand what kind of personality you are dealing with. A person familiar with DISC who meets with someone, can pretty much tell what their profile is by understanding the two diagrams here (the one above and the one below), and from this; they will quickly know how to develop rapport with them. The executive who leaned forward and talked fast and looked the salesperson right in the eye is most definitely a high D

followed by I. These types will be competitive and spontaneous. They may appreciate a methodical approach in a theoretical sense, but they are more likely to listen if you are quick and focused verses more touchy (human) and process driven.



On the other hand, you can tell the type of person who is all process and spreadsheet driven. With these types, don't try and move too fast. The analogy for both of these types is that of a Microsoft Excel spreadsheet. If you have an Excel spreadsheet that is full of numbers, the high D person will first look over the whole sheet, then will look at the bottom number, and then quickly scan to see the column headings to see if anything was forgotten. Then they will focus on the

bottom right number – The results. The high C person will look at the whole sheet but will quickly come back to cell 1A and then look at cell 1B and then 1C and so on, and make sure they are all correct. It will be a laborious and painstaking process to get through the spreadsheet if you are a high D person, but if you want to gain her trust, then you need to be ready to do it.

Understanding the personality types is very important in moving ahead in the sale. Seasoned sales people don't need to know or understand the DISC methodology – they just 'get it' and have been doing it for years; and you may be like that, too. In fact, odds are you don't need an extensive study of this DISC methodology, but you should understand the concept behind it.

**# 3: Her or his strategic initiatives and the five business issues: *Becoming The Trusted Advisor (without ever mentioning those words).***

Too many sales people waste time with anyone who will talk to them. Do you need to make sure every blade of grass is cut on your lawn? And even though there is a strategic time to go after the middle management team, it is still important to see the different conversations you will have with different people depending what role they are in. If you

are in the ‘Consideration’ Phase of a sale and you are talking to an IT Manager, your conversation needs to be centered on more tactical issues than if you are talking to the CIO where you need to have a more strategic conversation. Too many sales people, and companies, use the same pitch regardless of the person. For this reason, if you are talking too tactical with all kinds of ‘features and benefits’ and feeds and speeds, the CIO will kindly turn you over to someone else as soon as you start talking. As you are escorted out she will kindly say, ‘Thanks for coming by, Matt. What you have is extremely important to us, and I am going to have Jim Wilson, our IT Manager get a hold of you.’ And you walk away thinking, “Wow that was great. I got the top person to refer me to the IT Manager. He’s gotta listen to me now because she is his boss. Man, am I ever glad I used my relationships to get this meeting.”

But here is what is really going on. She is thinking, ‘this guy is talking all feeds and speeds; I could have gotten that from the darn brochure – I was told that he had something of value to bring to me. I was hoping for a more strategic conversation. I will tell Jim to be polite to him, but then to let him go; he just doesn’t get it.’

So you call Jim Wilson (or e-mail him), and you tell him

(with some smugness) that his boss has referred you to him, and you ask for a meeting. He cordially responds and says he is really busy now, but wants to meet with you soon. And this goes on for two or three weeks. After a few weeks you get frustrated and contact the CIO and she now doesn't respond and now you start grasping at straws and you are wondering what happened. In reality, the relationship was over when you got to the third sentence with the CIO. She was looking for a Strategic Conversation, in conjunction with tactical solutions, and you only went in with a Tactical conversation. She felt misled and now doesn't 'trust' you in an off-hand kind of way; rather, she doesn't trust that you will deliver the value they are truly looking for. Most times, when talking to a C-level person, your conversation must revolve around a 'strategic' platform in conjunction with a tactical conversation of how you are going to 'do' the solution; i.e., the work.

What are C-Level executives looking for? They are looking for a trusted strategic advisor than can deliver what they talk, – more than just a trusted advisor, and more than just a tactical vendor.

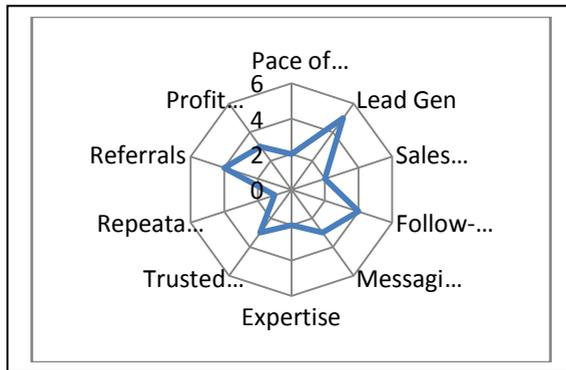
This is written in 2011 – 3 years into the deep recession and today companies need help. They are short staffed and overworked and the 'change' environment is swamping the

boat as the economic winds keep shifting and new marching orders are shouted out seemingly hourly. They need help bailing and they need to know where to point the compass heading! This is where this new role the ‘Trusted Strategic Advisor’ comes in.

Here is where you need to think company-wide and industry-wide strategically (while always being able to deliver tactically). As a Trusted Strategic Advisor, your job is to:

1. Understand the CEO’s core vision. [NOTE: Different people have different definitions for Vision. Some are as simple as ‘Who you are; What you do; and How you do it.’ And others are more complex and roll in a 5 year statement that involves their customers and staff.] However, the kind of vision that is addressed here is the ‘internal’ vision. What is the vision of the management staff that is not on the website?
2. Next you need to look at the trends of the industry and the global market to see where the industry, as a whole is going.
3. Does their vision fit in?
4. Next you look at where they are ‘off the mark’ from two perspectives: Globally and with their own

vision. At Hi-Q group, we call it, ‘Where the broken spokes are.’ And maybe the spokes are just bent, but the idea is the same: The wheel doesn’t spin true with either broken or bent spokes. We use a ‘radar analysis’ to graphically show this (this can easily be done on an excel spreadsheet).



5. Get moving. Your job is to help get that wheel spinning true again. So you probe the company’s core strategies and core business drivers to discover the company’s (desired) direction and see if it matches to the ‘broken spokes’ to get the wheel true again. Then you advise and ***help*** them in their core strategies.
6. From there, your services will be intertwined like the string of the baseball under the cover, and all elements of price will disappear.

This is game changing and should align you with your C-level customer to a level no competitor will ever be able to touch. The competition will be talking feeds and speeds and you will be discussing how to align with the global market to be more agile. So after that conversation, who do you think the CIO will ‘trust’ to understand their needs?

John McVeigh, SVP, O.C. Tanner Corporation states this well when he says, *“Connecting to customer strategy is a game changer. This is not selling as usual. In fact, it’s the opposite. When done properly, the client no longer sees you as a sales person. You are now a businessperson focused exclusively on helping the customer achieve their strategic goals. And when that shift occurs, everything – and I mean everything – changes.”*

Your goal is either to learn the strategy, or help define it, of every organization you deal with; from current customers to prospects. Once you learn the strategy, then you have ‘cracked the code.’ And you don’t have to have all the answers; you just need to learn how to ask the questions which will lead to revealing what the focus of their ‘spend’ is on. You will help them find the answers. **Strategy dictates spend.**

Specifically; there are 4 critical realms of strategy:

1. Their competitive / head-to-head realm
2. Their unique positioning (USP) and global reach realm
3. The operation efficiencies realm
4. Their separation realm (how they put road between them and their competition)

This focus on strategy goes beyond the Sandler ‘Pain’ funnel and pain selling and, in fact, it goes beyond everyone’s sales methods. Ironically, it goes in the opposite direction. In the rear-view mirror of the pain funnel is the Opportunity Horizon – and that is where the Trusted Strategic Advisor resides; side by side with the President and all the C-level executives. Sure, pain has to be solved to ‘get to the opportunity’ but the Trusted Strategic Advisor will foresee problems and avoid pain. As well, not everyone has pain, they may just want to change their position or retool or offer a new product line. This goes beyond the consultant role and beyond ‘consultative selling.’ The consultant is someone with a specific skill-set that will ‘solve your problems’. He will find out what is keeping you awake at night. The Trusted Strategic Advisor will have you always sleeping better because of the vision he brings and will put the problem-solving consultant out of work.

In this Strategic Realm, there are 2 areas where C-level and President's exist; Be more productive, and Differentiate from the crowd (change the game). The Trusted Strategic Advisor will focus on those two areas.

For one of our clients who sells Supply Chain Software, this was what we trained the sales staff to have discussions around:

Be More Productive:

- Cut down on error entry
- Reduce Admin Tasks
- Ability to rank suppliers
- Reduce inventory due to forecast visibility
- Prevent possible supply disruptions
- Improve flow-through
- Prevent Mfg disruption lines
- Increase communication
- Reduces lost orders
- Reduces operating costs due to reduced expediting fees
- Eliminates price disputes
- Reduces receiving costs
- Consistent customs invoice paperwork
- Operate more as a virtual organization
- Solid paper train
- Reduces disruptions

### Be a Game Changer

- Quicker delivery of product / Reduce lead times
- React faster and be more agile
- React to customer demands quicker
- Eliminate inventory increase cash available
- More supply with less headcount
- Buyers focused on strategic sourcing
- Allow for more customer intimacy
- Allow suppliers to be more engaged and creative in the solutions
- Quickly find new / better suppliers

Finally, you can sell two ways: One is to sell what others are selling. In the case of my software client, that includes: Training, Services, Usage Studies, Coding, Data Entry, etc. The other way to sell is on ‘Divergence’. Divergence selling is selling solutions that represent ‘radically’ new ways of getting a job done that align with core strategies and core business drivers. This is where the ‘Client Strategic Evaluation and Analysis Meeting Form’ now comes in (page 81). Here, you find out their ‘Strategies’ and you marry that with your own research on the industry trends – this now

becomes a powerful sales meeting and you never bring up feeds and speeds.

Understanding ‘strategic’ selling is crucial and it goes beyond Sandler Pain Selling, and beyond, SPIN Selling, and beyond Solution Selling as it gets intimate with the core elements of the whole business and not just the issues at hand, which are prone to quick changes in this volatile market.

How do you get an audience with a C-level person in the first place? And if you get one, are there certain things to say and certain ways to act that will keep you engaged with the C-level person? Yes and yes.

### **Getting the appointment:**

The best way to get an appointment is to provide value. Period. The best way to provide value is to provide insight and solutions that help their strategic initiatives fulfill their corporate vision. The way to do that is to research and then provide white papers, studies, solutions and ideas around those things that match up to their strategies. There are several ways to do this, but understand that it typically takes time. Most sales people (and especially their managers) are impatient, and so they are looking for a quick fix. There are some ‘quick fixes’ out there, and the Customer Satisfaction

Survey is one of them, but you can't rely on this secret weapon to carry you to the goal line for the whole season.

### **My IBM Friend's 'Trick':**

Before we go any further in talking about how to establish yourself as the expert, it's important to share with you a technique that IBMer, Dan Moss, does to get appointments with C-level executives.

First he researches the company he is going to call and he will see what is happening in the news with them. Next he will call up that business that he wants to target and ask for anyone in sales. Because companies are always looking for sales, he almost always gets a voice to answer. And the conversation goes like this:

'Hello this is Jim, how can I help you?'

'Hi Jim, My name is Dan. I'm in sales at IBM and I'm looking for a new friend.'

'Oh, I am in sales, too, here at ABC. How can I help you?'

'Really? You're in sales? How is it going for you? It's been a bit tough for me lately. You know what I mean?' (Dan has a nice smile on his face when he is talking.)

'Hey, Dan. I'm Jim – oh, yeah, I said that. Well, yeah, real tough lately.'

‘Yeah, Jim. The pressure they put on us to get leads and appointments and sales is really stressful.’

‘No kidding.’

‘Hey Jim, can I help you get to see anyone you are trying to get to? Who are you targeting?’

‘Oh, uh...I’m OK. Hey who were you trying to get to, Dan?’

‘Well, I was just trying to get the name of two people, there.’

‘No problem. Who do you want to talk to?’

‘Well, I know the CIO is Jim Watson, but I hear he has someone who is his right hand man, an IT Director – do you know who that would be?’

‘Let me take a look here....uh, it looks like Sue Packard – does that sound right?’

‘Yeah, that’s great. And then do you know who is in charge of R&D?’

‘Let me see. I think that would be either Dr. Han Lou or Dr. Ravi Patel. Hey do you want their numbers?’

‘That would be great, but can I ask you a question first?’

‘Shoot!’ (they always want to help so badly)

‘Great, Jim. So tell me, I see that you guys are focusing on a new delivery model and you have a new CEO, but can

you tell me what your main strategic push is these days? Is there any ‘change management’ initiatives going on now?’

‘No problem. Yeah, our big push is for ‘lean’ across the board – from manufacturing, to supply chain, to finance and even sales – we’re going through a pretty rigorous push here.’

‘Wow – what does that mean for you?’

(Jim explains and Dan listens)

‘Thanks, Jim. And thanks for getting me those names, too.’

‘No problem. In fact, why don’t I give you their numbers and then route this call to one of them, when they see it comes from inside, they will answer it – who do you want to talk to first?’

‘Well how about Sue Packard?’

‘Sure thing, and then call me back and I’ll put you into the other ones phones.’

“Thanks Jim – what’s your last name and what is your direct number?”

And from there, Dan gets the names and the direct dial into the people he wants, and he finishes up with this.

“Hey Jim, I would like to learn a little more about your company. Can I come and meet with you for about 20 minutes just to learn about your company?” And he almost

always gets the appointment. There is a fraternity of sales people that Dan uses very well to get to whomever he wants.

Dan says there are two goals for every time you make a telemarketing cold call:

1. Talk to someone – the higher the better.
2. Get an appointment – the higher the better.

The Dan Moss method greatly overcomes the sales telemarketing hurdles and, over time, you will achieve your two goals. Eventually you will have gotten to the C-level executive. Now, because of your strategic focus, you will talk intelligently about what the company's direction is when he or she picks up the phone. Obviously, the best way to get the appointment with the C-level (other than a referral) is to first establish yourself as the 'Expert' as discussed earlier, but an expert in something he or she needs; which is what you just found out from the sales person's phone conversation. Now, if Dan doesn't get a 'talkative' sales person, then he just hangs up and tries again within the same company.

There are several ways to establish becoming the expert, and the best way is to write a book – like this. Writing a book may sound ridiculous or daunting to you, but if you want credibility, then 'write the book' on your topic and everyone

will seek you out. Let's just go through how you write a book. It's a simple 9 step process.

1. Pick a topic in which you could give a 1 to 3 hour seminar on that topic. Naturally, for business sake, make it around your USP (discussed in Chapter 5). Something that sets you apart as the expert.
2. Outline the topic into about 15 PowerPoint slides. Now you have your chapters of the book!
  - a. Be certain to have research data to back up as much as you can.
3. Create the presentation and give it to some group so that you have it down cold.
4. Now just 'fill in the blanks'. Simply type away at what you would normally say.
5. 365. If you have a hard time getting going, as most do, begin with writing just 365 words a day. You will be surprised how quickly the book will be done.
6. Read through and edit it 3 times. Look to take out all the 'I' words and sentences. Look to not get too preachy and too wordy (the pot calling the kettle black here).
7. Send it off to 3 friends to get their feedback.
8. Rewrite it again for clarity and final thoughts and eliminating the wordiness again.

9. Format it or send it to a company to format (see next page).

That's it.

Then you book webinars and talks with Associations that your clients belong to and you offer them on your own. You now have a presentation and a book to go along with the presentation.

Writing a book pushes you to define your offerings better and it forces you to do research in your field – all which make you more attractive and more of an 'expert' to your audience. You will create more of 'the energy' that was talked about on the first page of Chapter 1. You will then gain audiences to industry leaders and be asked to sit on boards and your credibility stock will skyrocket. The more you are an expert, the more you can charge - *'You don't get fired for hiring IBM'*.

It is much easier to write a book today than ever before. Here's the irony: almost no one will read your book, but it doesn't matter. It will set you apart from all your competition. Now, just because no one may read your book doesn't mean you can just slop something together. You must write the book as if it were going to be read by Peter Drucker or Jack Welch or Sam Palmisano. You can get an e-book produced through Amazon without much trouble. There are services to

help you do it, as well. Here is one called, BookBaby:  
<http://www.bookbaby.com/ebook-retailers/amazon>.

We tell all our clients that they need to write a book to establish themselves as the experts. Here is an e-mail received from one of our clients after they were instructed to write a book and create a presentation:

Hey

Matt .

Catching up on my emails. Thank again. The 3-hour lecture is a challenge, but I think you're right. While I was in California, I visited my competition (which is doing "way" better than I), and they had an entire shelf of books they'd written...

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Having a main publisher like McGraw Hill publish your book is the BEST way to go, but your first step is to get your work out there! If you can create a Webinar, then you can write a book. Begin with White Papers, Blogs, Articles, and Interviews. These will all establish you as an expert in the

field; and this you can do in a matter of days or weeks, not months.

In order to be ‘viewed’ as a Trusted Advisor, you have to ‘climb over the wall’ to where you previously existed.

So where are you now in the eyes of your customer? Are you a supplier, a consultant, or a trusted advisor? All three can be a good place to be, but to be the Trusted Advisor typically means you will stick around longer than the other two when times get bad.

**Where are you?**

Supplier	→	Consultant	→	Trusted Advisor
Take orders		Problem Solver		Transform Business
Technical skill		Develop Specialist role		Team Selling
Whoever it takes		Customer knows problems		You know problems
Commodity		Item Budget		Salaries and Bus Costs

If you are a supplier, then, typically, you take orders, you have high technical skills and you go to whoever will give you the sale, you are price driven, and you are a ‘commodity’.

If you are consultants, then you are a problem solver (not a bad thing), you have developed a specialist's role, the customer knows what the problems are, and you are hired as long as there is a budget for you (or as long as you know how to extract budgets from other departments), and you are hired as long as there is that problem that you can solve.

If you are a Trusted Advisor, then you actually 'Transform the business', you are focused on Team Selling, YOU know the problems, and now you are indispensable to the organization, so you are drawn up right with the Salaries and Business Costs. Many consultants believe they are trusted advisors, but they aren't. One has to be careful to not misunderstand someone with 'good advice' over a true trusted advisor. The person with good advice but who really can't affect change; i.e., be 'transformative' is no more valuable than the guy at the local bar with a good opinion. He's not someone you would hire. I have seen good consultants fall flat when they try and become a trusted advisor and they expect the organization to pay them for 'being so wise and sageful'. Well, that doesn't work.

If you don't know how to 'Transform the business', then stay a consultant that solves problems for your customer, so that you can feed your family. Good Trusted Advisors get C-level execs 'thinking' and challenging their position in the

world. They challenge the core strategic planning questions of all businesses:

Who Are You?

What Do You Do?

How Do You Do It?

They get executives and owners thinking around the five key business questions:

## The Five Business Issues Frame Trusted Advisor Business Discussion

1. **The Economy**
2. **The Global Market**
3. **The Internet / Mobile**
4. **Regulations / Industry Requirements**
5. **Enhancing the Customer Experience**



1 – How is the economy affecting your business, and what are you doing about it?

2 – How has the global market affected your business, and how are you taking advantage of it?

3 – How has the internet and mobile devices affected your business, and how are you leveraging it, and how can you leverage it better?

4 – How are industry and government regulations and requirements affecting your business and how can you minimize them while maintaining trust?

5 – How are you enhancing the customer experience within every department and within every job?

Are there more questions? Yes, of course. But these are big questions. Like a good lawyer, however, don't ask a question you don't know the answer to. So be certain that 'you know the problems and you know the answers.'

*There was a great cartoon that I saw in the Wall Street Journal's 'Pepper...And Salt' that I can't show due to copyright laws, but it shows these two guys in an office environment. One is sitting at his desk in a cubicle and the other guy has walked up to him and you can tell they have been talking for a minute. The guy sitting down is looking up at the guy who just walked up to him and says, 'I try to think globally, but I can never get past New Jersey.'*

There are walls between each stage, and your job as you move from Supplier to Consultant to Trusted Advisor is to get

over the wall. You get over the wall by the way you think and the answers you provide.

Hi-Q-group

## Strategic Thinking

Operational	Perspective	Strategic
Competence	Value	Insight
Persuasive	Wants to be	Empathetic Partner
Pain	Seeking	Change the game
We are #1	Positioning	You are #1
Cost	Sell on	Value
Techniques	Driven By	Motivations of Importance
Certainty	Attitude	Confidence
Imperial	Style	Interactive

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Do you think operationally (tactically) or strategically? Understand, it is not wrong to think tactically, but your competition will be greater if that is the only place you reside. Clearly, to be successful, you must think BOTH ways in order to deliver the best value for your customer and thus be the one that gets hired verses only the one who talks about feeds and speeds or the one who only talks in strategic platitudes. Now, this is somewhat ‘out there’ kind of stuff, but hang in there for the next two pages and then we’ll cover a real example.

What is the perspective of one who is operational verses one who is strategic? If you are more tactical or operational, then your ‘value’ will be based on your competence verses if you are strategic your value will be ‘insightful’. If you are operational you will want to be ‘persuasive’ in presenting your points and your thinking verses if you are strategic you will want to be an empathetic partner; i.e., you will ‘care.’ The operational person will seek ‘pain’ as the means to get their point across (Sandler sales is totally based on this); whereas the strategic thinker will look to be a ‘game changer’. The tactical person’s position is ‘We are #1’ where the strategic person’s thoughts are ‘you are #1’; and ‘you’ can be the customer, the staff, the shareholders, etc., but it is not themselves or their immediate customer. In other words, the operational person looks in and the strategic person looks out.

Too many times the tactical person looks at ‘the bottom line’ and the cost whereas the strategic person looks at the ‘value’ derived from any decision; and more importantly, the value derived from what the customer or stakeholder gets. The tactical person is driven by ‘techniques’ to get their point across (does this sound like Sandler again?), whereas the strategic person is drive by ‘what’s really important here?’ The tactical person’s attitude is oftentimes very ‘certain’ whereas the strategic person’s attitude is more of confident

tone (remember the #1 most important thing in dealing with a C-level is confidence and not cockiness or certainty). And finally, the interactive ‘style’ of the tactical person is one of dominance or imperialistic whereas the strategic person’s style is interactive.

OK so you hung in there, but you are not fully sure how this fits into you. Let’s say you are an IT Application Development company for SAP ERP systems. You have an international client that you are only doing the upgrade to the ERP Financial module. You realize that this is just one part of the system upgrade and that you are not doing the whole upgrade and you want that work. You go to the IT Director in charge of the project and say, ‘Who is doing the whole upgrade of the ERP system?’ He looks at you and says, ‘We are putting it out to bid, but this module had to be done right away.’ You say, ‘I see. Is the company who installed the system involved in the bidding?’ The IT Director says, ‘Yes.’

You realize the odds are stacked against you to get the whole project, but you have choices here.

- 1 – Give up and just do your work.
- 2 – Learn the strategic positioning behind the upgrade and try to answer the 5 business questions for your customer.
- 3 – From that either approach the customer or the legacy company (if you can trust them, which you probably can’t).

You decide on option 2 – why not go for it?

A week later you come back to the IT Director and say, ‘You know, I took a look at your published articles on your company and took a look at your strategic direction. I agree that you need an upgrade to the system, but if you don’t install modules ‘A, B, and C’ correctly, then you will be off the mark of your strategic plan and then you would be back at square one. Who is writing the RFP?’

Now, all of a sudden you are looked at totally differently. You are now both tactical – you can install modules; and strategic; you know why certain modules should be installed for the benefit of the company’s vision over just how to install them. You will soon have an appointment with the CIO.

#### **# 4: Your insight and wisdom into industry trends.**

There has been a lot of discussion around industry trends in two areas of this book, the list, where ‘industry endorsed’ was the biggest driver in purchasing, and in The Trusted Advisor, above, where your insight into their business is a game changer. How many sales people have come into your office and not known a thing about your business, let alone, your industry? And how many people have you met in a meeting where they know everything about you and your

business, and have it all printed out, and then ask you great questions around your business? Not too many, but those that do are ‘special’ and you trust them. Remember, people only buy from whom they trust, so make sure you know all about them and their industry.

### #5: His or Her Beliefs.

There is a great sales educator mentioned later in this chapter in regard to the traits of successful sales people. Steve Martin talks about heavy hitters sales. The ones who are heavy hitters (paraphrased) go deep with their clients and get into their mind. They end up getting deep with their customer’s true core beliefs. Here is how he draws it out<sup>xiv</sup>:



In the above diagram, you can see the process of sales and you can see where the heavy hitters diverge and go deeper. They go past the ‘persuasive sales call’ to ‘influencing politics’ (reference back to the ‘time to sale equation’), and then understanding their customer’s ‘organizational behavior’ and they get deep in the rapport (DISC) and then use ‘linguistics’ and the manner of how they speak (buzz words) to keep pace with the C-level. Here he shows that you must get past the features, benefits, and process and get to the more strategical elements of what is inside the executive’s brain. As Steve Martin puts it, *“The Heavy Hitter sales philosophy focuses on the most important aspect of sales: what salespeople do and say when they are face to face with prospective customers. It is predicated on preparing a psychological strategy before meetings and executing language-based tactics during calls to win over the hearts and minds of C-Level decision makers.”*

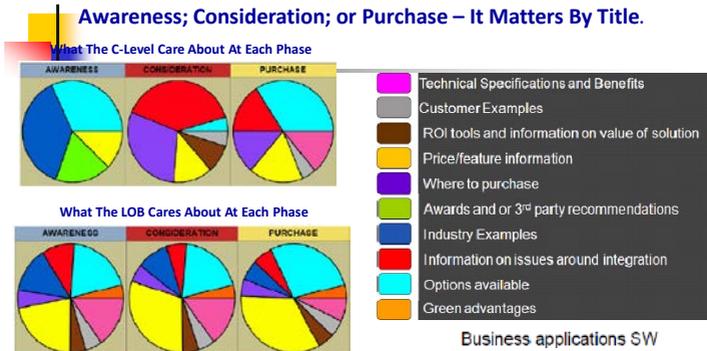
#### **# 6: Issues of importance.**

In regard to issues of importance, there are two sides to this notion of the issue, and the first we have already discussed in the perspective and process of thinking ‘strategically’, and the other issues of importance are those

that are dependent upon where the person is and who they are in the sales cycle.

As defined by Forrester, there are, overall, 3 phases to the sale: Awareness, Consideration, and Purchase.

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According to *Consumer Demand Relevance, 2010*, 55% of permission based e-mails do not get opened because it does not match their areas of interest. Matching content with title and where the prospect is in the buying cycle is critical for success.

From the diagram above, provided by Forrester, the C-level is going to have different issues of importance during different phases than will the Department Manager. For example, in the Consideration Phase, the Manager is concerned with nine issues while the executive is only concerned with six issues. The C-level is mostly concerned with ‘integration’; i.e., ‘if I buy this, will this much up the whole operations or make things better?’ Whereas, the

Department Manager is mostly concerned with Price since she has a tight budget to adhere to. So, knowing this, the smart sales person will talk to different issues with the Department Manager than he or she will talk about to the executive.

**# 7: His or Her Personal Goals or Feelings.**

Oftentimes, the higher up you go in the chain of command, the less the personal feelings of the person you are talking with matters. And the reason why is because the top C-level executives are more concerned with ‘matters of importance’ to the business than they are about their own career. The mid-level managers these days are oftentimes struck with fear of getting fired. So this issue is more important to them. For the organizationally-minded executive, this matters if it can help his staff to achieve their goals.

**# 8: How he or she communicates.**

Although people communicate in one of three ways: Auditory (hearing); Kinesthetic (feeling or touch); and Visual, odds are about 85% that whoever you deal with at the C-level will be a visual person. So, if you just stick to using visual language, “Do you see where this is going?”, odds are strong you will be right. Again, the reason why it is important to

understand how they communicate is so you can build more trust (we like and trust those who look and act like us). If someone comes to a meeting with pictures printed out, you can be they are visual. If someone comes and shakes your hand with both of their hands, then they lean more toward kinesthetic. To find out if they are auditory, kinesthetic or visual, ask a question like this to observe how they answer: “What are you seeing or hearing out there, or what are you even feeling, in regards to the economy these days and how it affects your business?” If they answer with ‘I am hearing’ then they are auditory, and if they answer, “I am seeing then they are visual, if they answer with ‘it seems like’ (or similar), then they are kinesthetic. From this you structure much of your conversation on that style of language to make them feel more comfortable. Like a good psychologist, you want your person to be fully comfortable so that you can hear the real issues that are going on and not answers based on a guarded exchange.

### **# 9: Options and Control:**

I’ll never forget one time when I was just beginning an important consulting job, and the executive was unavailable for a whole week, and yet we had to get the project started. It was frustrating and so I, wrongly, just went ahead and

scheduled work with his staff to get things going and I nearly lost the client on the second day because I took control away from him – Huge mistake. I had to backtrack and let him know that I understood I overstepped my boundaries there and we were ok, but control and options are a big, big deal with executives. So don't box an executive in. When going over issues, make sure to word things in a way so as to give her the final choice and option, along with your recommendation on how to solve the problem. Odds are great that your recommendation will be accepted, but to be obdurate is oftentimes the road to being poor; give solid opinion, but always give options for an out. There was a Sandler Sales training session at IBM one time, and the instructor was emphasizing a similar point when one sales person began arguing pretty strongly about the importance of not 'selling out'. The sales rep kept going on and on with the Sandler sales trainer when finally the Sandler guy said, "Dave. You have two options here. You can either be right, or you can be rich, which do you choose?" And that shut him up.

### **Traits of Successful Sales People.**

Here is a great article by Steve W. Martin on Harvard Business Review, June 27, 2011 – see below<sup>xv</sup>.



*Steve W. Martin*

*Steve W. Martin teaches sales strategy at the USC Marshall School of Business. His latest book on sales linguistics is [Heavy Hitter Sales Psychology: How to Penetrate the C-level Executive Suite and Convince Company Leaders to Buy.](#)*

*Seven Personality Traits of Top Salespeople*

*If you ask an extremely successful salesperson, "What makes you different from the average sales rep?" you will most likely get a less-than-accurate answer, if any answer at all. Frankly, the person may not even know the real answer because most successful salespeople are simply doing what comes naturally.*

*Over the past decade, I have had the [privilege of interviewing thousands](#) of top business-to-business salespeople who sell for some of the world's leading companies. I've also administered personality tests to*

*1,000 of them. My goal was to measure their five main personality traits (openness, conscientiousness, extraversion, agreeableness, and negative emotionality) to better understand the characteristics that separate them their peers.*

*The personality tests were given to high technology and business services salespeople as part of sales strategy workshops I was conducting. In addition, tests were administered at Presidents Club meetings (the incentive trip that top salespeople are awarded by their company for their outstanding performance). The responses were then categorized by percentage of annual quota attainment and classified into top performers, average performers, and below average performers categories.*

*The test results from top performers were then compared against average and below average performers. The findings indicate that key personality traits directly influence top performers' selling style and ultimately their success. Below, you will find the main key personality attributes of top salespeople and the impact of the trait on their selling style.*

**1. Modesty.** *Contrary to conventional stereotypes that successful salespeople are pushy and egotistical, 91*

*percent of top salespeople had medium to high scores of modesty and humility. Furthermore, the results suggest that ostentatious salespeople who are full of bravado alienate far more customers than they win over.*

*Selling Style Impact: Team Orientation. As opposed to establishing themselves as the focal point of the purchase decision, top salespeople position the team (presales technical engineers, consulting, and management) that will help them win the account as the centerpiece.*

**2. Conscientiousness.** *Eighty-five percent of top salespeople had high levels of conscientiousness, whereby they could be described as having a strong sense of duty and being responsible and reliable. These salespeople take their jobs very seriously and feel deeply responsible for the results.*

*Selling Style Impact: Account Control. The worst position for salespeople to be in is to have relinquished account control and to be operating at the direction of the customer, or worse yet, a competitor. Conversely, top salespeople take command of the sales cycle process in order to control their own destiny.*

**3. Achievement Orientation.** *Eighty-four percent of the top performers tested scored very high in achievement orientation. They are fixated on achieving goals and continuously measure their performance in comparison to their goals.*

*Selling Style Impact: Political Orientation. During sales cycles, top sales performers seek to understand the politics of customer decision-making. Their goal orientation instinctively drives them to meet with key decision-makers. Therefore, they strategize about the people they are selling to and how the products they're selling fit into the organization instead of focusing on the functionality of the products themselves.*

**4. Curiosity.** *Curiosity can be described as a person's hunger for knowledge and information. Eighty-two percent of top salespeople scored extremely high curiosity levels. Top salespeople are naturally more curious than their lesser performing counterparts.*

*Selling Style Impact: Inquisitiveness. A high level of inquisitiveness correlates to an active presence during sales calls. An active presence drives the salesperson to ask customers difficult and uncomfortable questions in*

*order to close gaps in information. Top salespeople want to know if they can win the business, and they want to know the truth as soon as possible.*

**5. Lack of Gregariousness.** *One of the most surprising differences between top salespeople and those ranking in the bottom one-third of performance is their level of gregariousness (preference for being with people and friendliness). Overall, top performers averaged 30 percent lower gregariousness than below average performers.*

*Selling Style Impact: Dominance. Dominance is the ability to gain the willing obedience of customers such that the salesperson's recommendations and advice are followed. The results indicate that overly friendly salespeople are too close to their customers and have difficulty establishing dominance.*

**6. Lack of Discouragement.** *Less than 10 percent of top salespeople were classified as having high levels of discouragement and being frequently overwhelmed with sadness. Conversely, 90 percent were categorized as experiencing infrequent or only occasional sadness.*

*Selling Style Impact: Competitiveness. In casual surveys I have conducted throughout the years, I have found that a very high percentage of top performers played organized sports in high school. There seems to be a correlation between sports and sales success as top performers are able to handle emotional disappointments, bounce back from losses, and mentally prepare themselves for the next opportunity to compete.*

**7. Lack of Self-Consciousness.** *Self-consciousness is the measurement of how easily someone is embarrassed. The byproduct of a high level of self-consciousness is bashfulness and inhibition. Less than five percent of top performers had high levels of self-consciousness.*

*Selling Style Impact: Aggressiveness. Top salespeople are comfortable fighting for their cause and are not afraid of rankling customers in the process. They are action-oriented and unafraid to call high in their accounts or courageously cold call new prospects.*

*Not all salespeople are successful. Given the same sales tools, level of education, and propensity to work, why do some salespeople succeed where others fail? Is one better suited to sell the product because of his or her*

*background? Is one more charming or just luckier? The evidence suggests that the personalities of these truly great salespeople play a critical role in determining their success.*

Look at these traits. These are the traits of a good person! They are the traits of someone you would ‘trust’. These aren’t the traits of the stereotyped salesperson who is loud, outgoing, pushy, etc. Work toward being a hard-working, disciplined, good person who cares for others and you will be a successful sales person.



## Chapter 7

# The Offer

The Offer is the second most important item in the order of importance in all sales and marketing, and accounts for up to 50% of the success of a campaign. Yet this chapter is one of the shortest chapters in the book! The offer is really simple when you understand the three types of offering there are, and that is why this is such a short chapter – yet it is incredibly important.

Offer – up to  
50%

2. **The Offer** – what the customer gives up for what he gets - Accounts for up to 50% of the success of your campaigns.

The offer is simply: What they get for what they give. Most campaigns do a poor job in this area. Many times there is no offer at all! How many letters have you seen that begin with, ‘I’d like to introduce our company to you...’ Who cares about your company? People don’t have time to be introduced to every company out there who promises a host of benefits.

As was in the movie, ‘Jerry Maguire<sup>xvi</sup>’ starring Tom Cruise and Cuba Gooding, Jr., the famous line of the movie was when Jerry Maguire (Tom Cruise) speaks to Arizona Cardinals wide receiver Rod Tidwell (Cuba Gooding, Jr.) and Tidwell challenges Jerry to yell ‘Show me the money!’ Why is any prospective client any different? You can see it here at:



<http://www.youtube.com/watch?v=OaiSHcHM0PA> Every client wants you to ‘show him the money!’

Change is very hard and ‘risky’ for customers these days and so you have to make the offer very strong to get people to change their ways and try you.

## The Offer



What they get for what they give.

There are 3 kinds of offers:

1. Introductory
2. Value Prop
3. Make The Deal

## 3 types of offerings

### 1 – Introductory



Why respond?

### 2 - Examination



Can they deliver on what they promise?

### 3 – Make The Deal



Is It Perceived Value?

In dealing with the offer, most sales people go right to # 3 – Make the deal. As you remember back in the last chapter, there are three phases of buying, Awareness, Consideration, and Purchase. Back in Chapter 1 we focused on Trust. The offer has to be directly related to Trust for it to work. When you ‘introduce’ yourself to someone you are asking for some trust. Now, for many people ‘trust’ can be bought to a certain degree with premiums, gifts, and chotchkies.

The introductory offer is the best place to do this. When you are prospect marketing, whether it is in the form of SEO or direct mail, and you are asking the prospect to respond, the question that has to be asked by the prospect is ‘*Why should I respond?*’

Why indeed?! And thus you have the optimum question of the offer.

Before you can determine what the offer is, you have to decide what you want the prospect to do. Because ‘avoidance of risk’ is such a big deal in this economically unstable environment, prospects will very rarely buy or respond on the first pass. In business, to business, the buying cycle has gotten longer (and more people are involved) and so the odds of anyone buying up front are very limited. So, all we want to do is ‘start a trusting relationship’ with our first offering.

## 1 – Introductory Offering

### Why Respond?



Personal gifts, URLs /  
Video Demos / CD  
demos.



Only to right audience

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In the introductory offer, almost never attempt to try and get someone to buy. Think of this as a courting relationship with the old front porch analogy. You see a pretty nineteen

year old young lady and an eager and polite young man and the setting is 1940s or the 1950s. First the young man shows interest in ‘the prospect’ by meeting at the library or somewhere (we can analogize this as a trade show). Next he may ask if he can come on buy some time and the prospect (the young woman) says, ‘well, we always sit on the front porch every night at about 7 pm’. So, he decides to wander on buy and he brings a box of chocolate. Dad is there (he’s the Board or the CEO) and is watching with pretty askance look when the young man shows up with the chocolate. So the young man offers chocolates and he sits on the top step and they chat a bit.

He doesn’t say anything stupid and yet he gives some thoughtful insights and so the dad (CEO) is thinking this might be ok to go to the next step. The young man leaves and the dad (CEO) talks to his daughter (main prospect), and says ‘what do you know about his family?’ (look up references). And she tells him what she knows and he says to check further (now being looked up on google, etc.).

So now the young man (salesman) asks out the young woman (prospect) and they go to a movie (the salesman meets and gets more information on the company’s needs), and the trust is increased. You can see how the box of chocolate helps to win over the young woman and her family and how

that helps build trust. The person comes giving verses comes asking or taking.

So, in the introductory offering, give something of real or perceived value.

- Golf balls (are still the best)
- Chocolate
- i-Pad drawings
- i-Pod music cards
- Restaurant gift cards
- White papers (they are just so-so these days)
- Seminars or web-seminars
- Sporting events, or entertainment venues

And other things, too, but you have to be careful of too big of a gift for a prospect. It's the same with dating: You wouldn't want to overwhelm a woman with too big of a first gift. The gift needs to be in line with the level of relationship, or the level of the purchase of the product or service. In Chapter 14, we will talk about 'testing' in detail, but I recall do a test of two offers for a prospect mailing.

Test A: Offer a sleeve of golf balls for completing a survey: Response: 27%

Test B: Offer of a bottle of wine for completing a survey: Response: 7%

It was obvious from this test, to a prospect audience, that the bottle of wine was ‘too much.’ People got scared off from it. It may also have been a little inappropriate since it involved alcohol.

What you don’t want to offer here is any money incentive to buy the product. That would be like the young man asking the young woman to marry her on the first date – too much!

### **Value Prop Offering:**

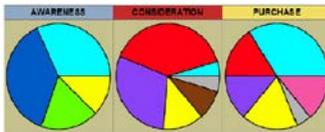
Now we come to the next offering level, the Value Prop Offering. If you are at this point, then the prospect understands you and trusts you a little at this time. Now the prospect is examining you and asking, “Can they deliver what they promise?” So here your ‘offerings’ are based on the value prop and based on who you are talking to. More in-depth seminars and, as shown back in Chapter 4, information based on integration and other issues (see the now familiar Forrester; 2 figures below):

## 2 – Examination / Value Prop Offering



### Customer Asks: “Can They Deliver?”

What The C-Level Care About At Each Phase



What The LOB Cares About At Each Phase



- Technical Specifications and Benefits
- Customer Examples
- ROI tools and information on value of solution
- Price/feature information
- Where to purchase
- Awards and or 3<sup>rd</sup> party recommendations
- Industry Examples
- Information on issues around integration
- Options available
- Green advantages

We discussed before how all businesses want to get to ‘agility’ and you must stress this, in some form, to the prospect in the Value Prop Offering.

IT Spending Justification for Midmarket Firms

Strategic Planning Assumption: Through 2006, 80 percent of midsize businesses will be either disorganized or reactive and will inhibit their progression due to lack of governance (0.7 probability).



How are you going to help the prospect move up this triangle? That is your value prop offering: ‘Show me the money!’

At IBM, for the PC Division, we conducted a great Value Prop offering. We were in Chicago and we had already targeted 15 companies who each needed about 3,000 to 7,000 new PCs. They were either going to Dell, HP or us. So we put together a very strong, and expensive, means to get them to see our value prop.

We invited all the CIOs of these companies and their significant others to dinner and to see the newly released Broadway production of ‘Wicked’. As well, we had them all meet downtown at 3:30 p.m., at a nice restaurant where we reserved the back room. We had cocktails and then we

brought a shuttle bus and gave each of the significant others a \$100 American Express gift card and then shuttled them to a downtown mall for an hour long shopping spree. While they were shopping, we brought in our best PC ‘value demonstrator’ and he put the IBM, Dell and HP laptops side by side and took them apart and did a comparison – it took about an hour or so. The IBM sales reps were all there, too. Then the significant others came back, and the sales reps asked for an appointment to see them next week.

The wives and significant others were all happy and had gifts in their hands and so when the sales reps asked for an appointment, what could they do?

From there, we all had dinner, and then the CIOs and their guests were given their tickets to the Broadway show and the reps left. The shuttle bus was waiting for them after the show to take them to their cars.

The whole affair cost us \$10,000 and we sold over \$6 Million in PCs from this event.

This was a great example of combining the Introductory (although they had already been introduced) and the Value Prop offering (the demo class) at the same time.

## **Make The Deal Offer.**

Now you have gotten past the introduction and you are courting the prospect and now comes the time to ‘pop the question’. So what would the young man offer the young woman? Would he offer her a life of drunkenness, poverty, and carousing? I think not. But still, the young woman wants to see the ‘ring’ which is the final price offering. The only time you jump right to the “make the deal” offering is with your current customer base and you have already gone past the introduction and value prop. So you can offer them ‘deals’ on software, service or evaluations, or whatever. Here is where the deal making happens.

## **3 – Make The Deal!**

**People Buy just as they sell.**

**If they sell on value, then they buy on value, if they sell on price, then they buy on price.**

**Understand how your customer sells.**

**Perception of price is most important.**



**People Buy As People Sell.**

When you are making the value prop offering and you want the customer to buy from you, you must first understand how they sell. Here is an example, my friend, a consultant, went to an Application IT Development company to offer his services of growing their business as a monthly fee, and they insisted on knowing ‘how many hours’ he was going to spend. ‘Well, I don’t bill that way’, he said. He tried to explain to them that they set goals, achieve them, and this has a value and he charges for that value. They couldn’t understand that, no matter how often he gave them a different view of this. And the reason was because they only charge by the hour to their clients and charging by the hour was the only way this made sense to them. So, he broke down the bill to ‘charge by the hour’ and they accepted the proposal right away.

People buy as people sell. This company sold by the hour and so they were going to buy by the hour. Just knowing that has greatly increased the acceptance of many proposals.

### **How Many Offers?**

The question that gets asked most often in regard to the offer is ‘what to offer’ and ‘can I offer two things at once’? The ‘what’ is described above as it depends on where you are in the relationship, but the second question is much easier to answer.

Only offer one thing at a time.

If you offer more than one thing, whether it is the introductory offer of golf balls vs. chocolates, or a pricing offer in the ‘make the deal’ stage, anything more than one offer will confuse the customer and add to the time it takes to get them to make a decision or you will lose them altogether.

Below is an example:

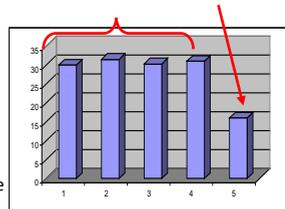
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## Test

### Lapis CPM Survey Mailer to 5 cities for a security solution.

All cities mailed the exact same survey with a single offering for filling out the survey. But city 5 was also sent a ‘Save the date’ for a security seminar.

Cities 1, 2, 3, and 4 received either a **30% or 31%** response. City 5 (the ‘save the date’ insert) received a **16% response**.



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At IBM, the sales team was working to get information from prospects and so we did a survey campaign for five different mid-western cities. We did a campaign for Cleveland, Chicago, Louisville, Columbus and Pittsburgh.

The IBM Sales Manager for Pittsburgh said, ‘Let’s just throw in this ‘save the date’ piece so that we can let customers (prospects) about this seminar we are holding?’

Although a few of us were against it, he insisted saying that we weren’t asking anything of them, and so we relented. As you can see, the little coupon was the size of a dollar bill (thus called a buck slip) and we simply put it in the envelope with the survey. As you can see, the cities where we had only the one survey offer all received a 30% or 31% response!!!! Pittsburgh got a 16% response (which is still good), but that was about half the response of the other cities. Why? Because there were two offers and the readers got confused for a quick second, which is all it takes to lose them. Make sure you make just one offer and make it **STRONG**.

### **Some Types of Offers:**

We have tested many offers and found out many things. Here are some things we have found out:

- \$2 Bills put in an envelope as an incentive pull as good as \$5 Bills and a lot better than \$1 Bills
- \$1 Presidential Coins pull almost as good as the \$2 Bill
- A \$2.00 off coupon pulls as good as a \$5.00 coupon

- Dollar amounts off work better than percentage amounts
- Free ‘anything’ works
- Free book offers don’t work that well
- iTunes gift cards are good pullers
- Chocolate as a free gift works well
- Free white papers to get contact info works well

As good as these are, there are hundreds more you can do. The chapter on testing will teach you how to test two offers and it will teach you how to test so that your offers are valid.

## Conclusion

Sending multiple offers confuses a reader.



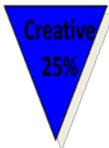
Rule: Send one offer only.





## Chapter 8: The Creative.

The creative is merely the vehicle that takes the offer to the audience.



- 3. The Creative, or the 'vehicle', only accounts for up to 25% of the success of a campaign.**

The List accounts for up to 75% of the success of a campaign and the Offer accounts for up to 50% of the success

of a campaign, but the Creative – or the vehicle – only accounts for up to 25% of the success of the campaign.

Now, don't misunderstand here; the creative is very important and campaigns have gotten 100% more response rates by just changing the creative, but that was when the list and the offer were properly defined first.

The Creative is the most fun and so most companies will typically take the most time with it.

### **Personalization:**

Great lead generation in the B2B world begins with great direct marketing. And great direct marketing begins with great copywriting, and here is the # 1 Rule of great copywriting: *Talk to the person on a one-to-one, caring basis.* Whether you are writing a letter or doing an ad or doing social media or a web site or a flier, or anything; write as if you are writing to one person in mind. Pick someone, and write the copy for them.

The roots of great copywriting for blogs, websites, newsletter, seminars, etc., come in the form of writing a great direct mail letter. If you can do that, then you can write great copy anywhere. Direct mail copywriting is the most challenging form of copywriting there is.

Let's go through how to write a great direct mail letter. First, as mentioned, make the letter as personal as possible.

Odds are 80% or more that your grandma was the first person to write you a letter. Grandma really loved you and what did grandma talk about in the letter? You! Grandma most probably did not talk about herself or about what is ailing her or anything like that. She talked about how good you made her feel and how special you are. Grandma never wrote, ‘Dear Valued Grandchild’ at the beginning of the letter.

## Grandma

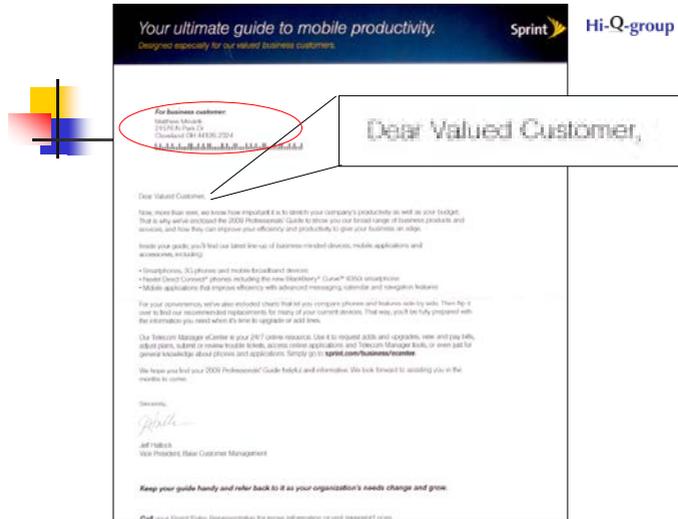


Grandma never wrote,  
“Dear Valued Grandchild”

When grandma wrote you a letter, you read every word. The reason is because grandma never talked about herself: She only talked about you! That is exactly what we want to do when you write a direct mail letter.

Rule #1 – don’t do any letters with ‘Dear Valued Customer.’ After all, how ‘valued’ are they if you don’t even

know their name or are not willing to put in a little effort to put their name on a letter?



In this letter, above, Sprint wrote to me, and personalized the address and then was too cheap to put my name right below and so it starts off with the worst of all openings: 'Dear Valued Customer' - amazing!

Now there is a 'formula' for writing a great letter that is well known in the industry? AIDA. And this stands for: Attention; Interest; Decision; and Action, and to that is added Urgency.

## AIDA and Urgency



But that is what the teachers at the Direct Marketing Association all teach (and it was humorously shown in the movie with Alec Baldwin, ‘Glengarry Glen Ross’ © 1992; and here it is on youtube – be careful, there are F-bombs in this: <http://www.youtube.com/watch?v=y-AXTx4PcKI>).



Here is another form of AIDAU. It is what you want the person to say when they are reading a letter. One could call it the WHO method as the W, H, and O are the main letters of what you want the person to say. We want the person reading the letter to say these things when they read it:

“Wow!”

“Really!”

“Huh”

“Uh, OK – I guess.”

“Oh, Yeah. OK!”

Here is a wild example (wild in regard of the actual letter I use here to illustrate the point) that has been used to demonstrate this method to marketing and MBA students at John Carroll University. A young man is picked out in class to participate, and let’s say his name is Brian (and he can’t be married at the time).

“Brian, what if you were to get a letter that said the following:

“Dear Brian,

I have a hat for you. It’s called a ‘Babe Hat’ and it attracts ‘Babes’ to you! Any kind of babes you can imagine!

And Brian says, “Wow!” and the letter goes on...”

“Our researchers have been developing this hat for over 30 years and it is now ready. The way it works is that when you put it on, it reads your brain waves on the type of babe you want and then sends out the right pheromones to attract that woman right to you. Tall, short, blonde, brunette, smart, not-so smart...whatever you want.”

“And Brain, say “Oh really?” and the letter goes on...

“It’s true. Take a look at these testimonials from all the happy customers...”I couldn’t believe it when I heard about it, but it works. Now I have a great babe as my wife!...” and on and on, and Brian now says,:

“Huh.”

The letter goes on: “All you have to do to get the hat is call 1-800-800-8001 and for 6 easy payments of \$30, that’s just a dollar a day, you can have the babe you always desired. –and your looks or personality

don't have any bearing on its affect. So order it now before we run out.”

And Brian now says, “Uh, okay – I guess” (he's not fully convinced at this time).

And because he is not fully convinced you put in a PS.

“P.S. By the way, I thought you might want to know; the government has decided these are illegal and will force us to stop making these next week, so you better order yours RIGHT NOW. And one last thing, we only have one left and your rival, Butch, has got this letter, too, so you better not wait one more second, but call me so that you can get the very last BABE HAT.”

And Brian says to himself: “Oh Yeah! OK”.

And that is how you writet a direct mail letter. The point of this letter was that it was all about Brian. Sure it talked about the 30 years of research, but only to give the credibility. The letter really talked about Brian.

The letters which are the worst begin this way,

Dear Valued Reader,

In these difficult economic times, your decisions about money have never been more important than today. At Mass Mutual we know this and we are the largest blah, blah, blah....”

These letters are horrible. Where is the ‘Wow!’? And where is the ‘Attention?’ It’s not there. It talks about Mass Mutual and it doesn’t even personalize the letter by putting their name on it.

Most of you have probably heard of the world’s most popular radio station: It is 99.5 WIFM, which translates to ‘99.5% of the time the only thing that I care about is ‘What’s In It For Me?’

Yes, you have to establish credibility, but do it with testimonials of how your product or service benefited the person.

In the funny sample of the letter above, you can see where the AIDAU is the same as the WHO letter.

“Wow!” → Attention

“Really!” → Interest

“Huh” → Decision

“Uh, OK – I guess.” → Action

“Oh, Yeah. OK!” → Urgency

But great direct mail letters are both an art and a science. And the science is the ‘AIDAU’ formula. The art aspect of a good letter is that it has to be ‘Scanable’. As brilliant as many great letters are, people don’t ‘read them’ – they scan them. People are scanning them for what is important to them – WIFM. Thus, you want a letter that has a lot of variation to it. You don’t want the old block style that (some of) you were taught in school. You must use different lengths of paragraphs, and bullet points, a little bolding and italics (not too much) and you have to have an image of the offer right up front.

The type of font you use is very important, too. And if you can really personalize it by hand writing the outside envelope, then that would be even better.



## 8 Key Graphic Points to a Great Looking (Readable) Letter

- 1 - Type font - For hi-tech: ZapfHumnst BT
- 2 - 1st PP 3 lines - include 'You'.
- 3 - Indent Paragraphs
- 4 - Different PP lengths, bullets, single line
- 5 - PS
- 6 - Personalized
- 7 - Picture of offer - right up front
- 8 - Make letter 'Scannable'

Finally, you always have to include a PS. It is the second item read in a letter and it really drops the guard of the person reading it.

To illustrate the point of the importance of the graphics of a letter, the next two pages have two letters written for a DirecTV distributor in the Louisville area. The first letter is written in the style we were all taught in school, the block style. And the second letter is the more scannable one. These letters have the EXACT same words, yet the second one pulled 100% better response: A 4% versus a 2% for the first one!



Discernity, LLC  
Matthew M. Minarik  
PO Box 26425  
Cleveland, OH 44126  
Mobile: 440-724-6363  
Email: matt.minarik@discernity.com

February 22, 2008

Mr. Stephen Freireich  
A.O. & W Realty Co., LTD.  
PO Box 39574  
Solon, OH 44139

Dear Stephen,

I am a member of NOAA and I live locally, but more importantly, I am a licensed dealer for DIRECTV and they have just allowed me to make an incredible offer to you, as an owner of a Multi-Family property.

Our DIRECTV license allows us to provide DIRECTV to you, for your residents, where you, as the owner, make between \$10 to \$20 / unit / mo, and your residents save about \$15 per month from their typical cable bills! It's a Win / Win!

After all, it is your property, and you have to have TV, so why does the cable company get to make all that money from YOUR property and YOUR residents? Why don't you get some of it? With our model, it's really free money to you (or your residents, if you want, as some do). So why not have superior TV for your residents and make more money at it, too?

DIRECTV's superior programming choices (NFL, NASCAR, BigTen, etc.), Hi-Def, and superior picture quality gives you a much better amenity for your properties that you profit from. You see, the cable company is limited in both it's programming and it's Hi-Def. Some say, cable TV is passé, and that is why they are losing subscribers and DIRECTV is growing.

Here are the great advantages of going with our DIRECTV model; You realize thousands of dollars a month in new revenue; You provide superior TV AND save your residents tens to hundreds of dollars a year; You can turn off the TV and internet to delinquent renters (really works; You get rid of those ugly satellite dishes on your property with our one, small 22" dish.

So DON'T SIGN THAT CABLE CONTRACT, yet, and if you think this can't work because you have an existing contract, think again! The FCC ruled on October 31<sup>st</sup> that exclusive cable contracts are no longer valid, so DIRECTV can work for you with us -- others are doing it. We also provide FAST Hi-Speed Internet, too (wired or wireless), that is faster than the cable company's speeds (it too is less expensive than the cable's internet so you make more money)!

Please call me for a simple 5 or 10 minute phone call to discuss this great opportunity for you and your residents; it is a true win / win scenario. Remember, this can work even if you have an existing cable contract, and there are no up-front or install costs. For every 250 units, you would typically make between \$2,500 to \$5,500 / month! And if we agree to work together before March 31<sup>st</sup>, then I will give you an extra \$20 / unit the first month – FREE!

All my best,

Matthew M Minarik



Discernity, LLC  
Susan Humbert  
PO Box 531284  
Cincinnati, Ohio 45253-1284  
513-675-7754  
Email: susan.humbert@discernity.com

February 26, 2008

Mr. Stephen Freireich  
A.O. & W Realty Co., LTD.  
PO Box 39574  
Solon, OH 44139

**With DIRECTV you make an average of \$15 / unit / month EVERY month AND you get superior TV – it's a Win / Win.**

Dear Stephen,

I am a member of Cincinnati and Northern Kentucky Apartment Association, and I live locally, but more importantly, I am a licensed dealer for DIRECTV and they have just allowed me to make an incredible offer to you, as an owner of a Multi-Family property.

Our DIRECTV license allows us to provide DIRECTV to you, for your residents, where you, as the owner, make between \$10 to \$20 / unit / mo, and your residents save about \$15 per month from their typical cable bills! It's a Win / Win!

After all, it is your property, and you have to have TV, so why does the cable company get to make all that money from YOUR property and YOUR residents? Why don't you get some of it!

With our model, it's really free money to you for your residents, if you want, as some do!

So why not have superior TV for your residents and make more money at it, too!

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1. You realize thousands of dollars a month in new revenue.
2. You provide superior TV AND save your residents tens to hundreds of dollars a year!
3. You can turn off the TV and internet to delinquent renters (really works!).
4. You get rid of those ugly satellite dishes on your property with our one, small 22" dish.

So DON'T SIGN THAT CABLE CONTRACT yet, and if you think this can't work because you have an existing contract, think again! The FCC ruled on October 31<sup>st</sup> that exclusive cable contracts are no longer valid, so DIRECTV can work for you with us – others are doing it.

We also provide FAST HI-Speed Internet, too (wired or wireless), that is faster than the cable company's speeds (it too is less expensive than the cable's internet so you make more money)!

Please call me for a simple 5 or 10 minute phone call to discuss this great opportunity for you and your residents; it is a true win / win scenario. Call me at 513-675-7754.

All my best,

*Susan Humbert*

Susan Humbert

P.S. Remember, this can work even if you have an existing cable contract, and there are no up-front or install costs. For every 250 units, you would typically make between \$2,500 to \$5,500 / month! And if we agree to work together before March 31<sup>st</sup>, then I will give you an extra \$20 / unit the first month – FREE!

You can see the difference in the letters. There is also something we call the ‘Johnson Box’ up at the top of the second letter. This is where you put your offer – and if you can do it with a picture, instead of just words, then it is all that much more powerful.

Johnson Boxes were invented by Frank Johnson back in 1941 – and they still work!

It’s important to illustrate the power of mixing a great offer with a great looking letter that is written with all the ‘formula’ methods mentioned.

Hi-Q-group

August 3, 20

Mr. Jeff Cass  
President  
Lapin Business  
1470 Lloyd Road  
Wickliffe, OH 44301

Dear Jeff,

At Crowe Chizek, we continue to look for ways to better understand how Information Technology can improve the business processes of our customers. In fact, we are building our business around the needs of professionals like you.

Your input is extremely valuable on how we structure our Information Technology solutions. That's why I would like your input on the enclosed Information Technology Survey. And, although I know \$2 doesn't even begin to cover your time, I want you to have it as a small appreciation of your help.

- The survey is just nine simple questions.
- Most of the questions can be answered by simply checking off a box. It should only take two minutes to complete the survey.
- When you have completed the survey, simply drop it in the enclosed pre-paid envelope and drop it in the mail, or you can fax it to 800-440-1413.

I am trying to complete this survey analysis in the next two weeks, so if you could take just two minutes, right now, and fill out the survey, I would greatly appreciate it.

Sincerely,  
  
Martin L. Priller  
Account Manager  
Crowe, Chizek and Company, LLP

P.S. If you complete the survey and return it to me by August 24th, I will get you a sleeve of Titleist Golf Balls, absolutely free. Thanks, and I hope to hear from you soon.

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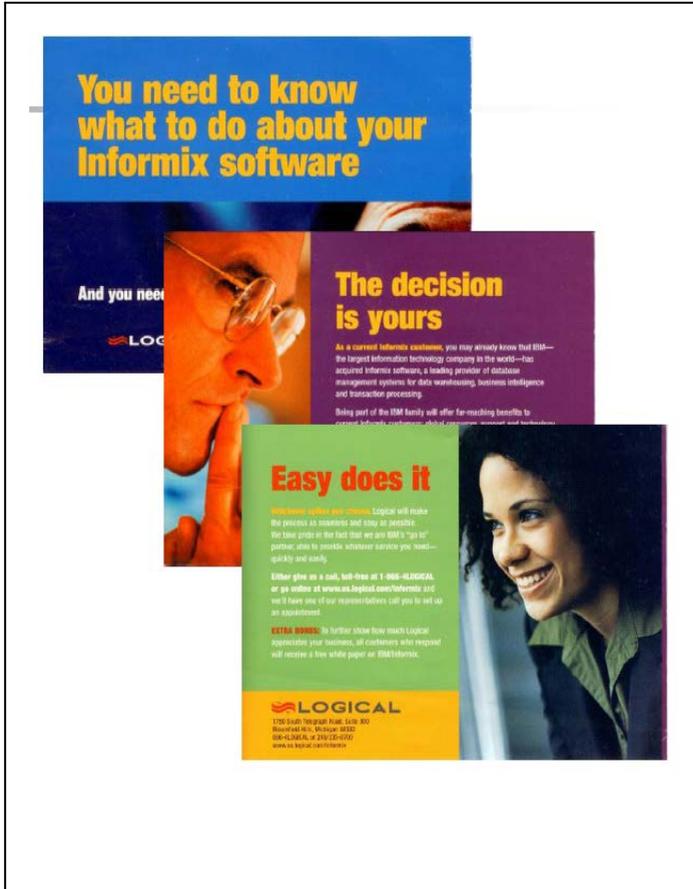
This is the ‘gold’ letter. This one was responsible for me receiving IBM’s top award two years in a row and it was responsible for (then) National City Bank generating over \$2 Billion in Commercial Banking Revenue (deposits, loans, leases, etc.) over the course of about 8 years. This letter generated over \$700 Million in Software Opportunity for IBM via their business partners in just six months!

The letter would include a real \$2 Bill and ask them to complete a survey on whatever technology we were marketing at the time (Servers, Database, Web-Software, etc.), and if they completed the survey in 10 days, then they got a sleeve of Titleist golf balls. Typically, this got a 20% response rate! Sometimes it got a 35% response rate! For National City Bank, they got a 50% response rate when we included the golf balls in the envelope up front!!

What is interesting is that the ‘creative’ is not necessarily all that ‘creative’. Below are two examples of direct mail with an IBM business partner. The first one is done by an ad agency and it sure looks ‘creative’ while the second one (the gold letter) is not that ‘creative’ looking, but has a very strong offer. (Recall that the offer is twice as important as the creative in determining success and here is the proof).

Below is a ‘creative’ three fold piece asking users to switch over to new database software.

This three panel self mailer done by the ad agency got a whopping 0% response rate in mailing to 10,000!



This ‘uncreative’ looking survey letter got a 17% response rate!

August 3, 2001

Mr. Jeff Gessler  
President  
Lapis Business Solutions  
4340 Lloyd Road  
Wickliffe, OH 44301

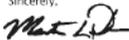
Dear Jeff,

At Crowe Chizek, we continue to look for ways to better understand how Information Technology can improve the business processes of our customers. In fact, we are building our business around the needs of professionals like you.

Your input is extremely valuable on how we structure our Information Technology solutions. That's why I would like your input on the enclosed Information Technology Survey. And, although I know 5/2 doesn't even begin to cover your time, I want you to have it as a small appreciation of your help.

- The survey is just nine simple questions.
- Most of the questions can be answered by simply checking off a box. It should only take two minutes to complete the survey.
- When you have completed the survey, simply drop it in the enclosed pre-paid envelope and drop it in the mail, or you can fax it to 800-440-1413.

I am trying to complete this survey analysis in the next two weeks, so if you could take just two minutes, right now, and fill out the survey, I would greatly appreciate it.

Sincerely,  
  
Martin L. Priller  
Account Manager  
Crowe, Chizek and Company LLP

P.S. If you complete the survey and return it to me by August 24th, I will get you a sleeve of Titleist Golf Balls, absolutely free. Thanks, and I hope to hear from you soon.



**FREE Custom Golf Ball Set For Completing Survey**



**Respond By April 16<sup>th</sup> and get Free Titleist Golf Balls!**

Non-annual  
personae with customized  
priority of shopping options.

ot Committed  
acquire, develop, and  
maint.

ot Committed  
job seminars, and improve  
formers and co-workers.

ot Committed  
application software to the  
M.

Established  
execution of the solution:

mos  Not Applicable

technology solutions for

\$250,000  
\$500,000  
\$250,000  >\$500,000

solutions that can  
check only one)

Trade Shows

Telemarketing  Other \_\_\_\_\_

6.  Please check if you would like simple, free 20 Minute presentation (required to receive golf balls)

7. Your Phone: \_\_\_\_\_ Your e-mail address: \_\_\_\_\_

Thank you! Your input is important. Please place in enclosed Business Reply Envelope and drop in the mail or fax it back to 800-440-7417 before **April 16<sup>th</sup>** to receive your **FREE Titleist Golf Balls** with your quick 20 minute presentation. Thank you, again.

BDM Form 1291-CDA-2/01

The business partner didn't think this one would work well, and so they only mailed out about 300. So the 300 pulled infinitely better than the ad agency's 10,000!

But of these two, which would you say is more 'creative'? The first one is more graphically creative by far, but it was lousy in generating any leads. There was no offer and it was tough to read. Remember the creative is defined not by how

creative it is, but rather, it is defined as ‘the vehicle’ that takes the offer to the audience.

### **The Gold Letter:**

Let’s go back and describe the Gold Letter in detail for you so that you can reproduce this yourself and generate tons of leads; and you will see several references to the Gold Letter in different areas of the book. Surveys, whether direct mail or electronic WORK1

The 8 elements of the Gold Letter.

1. Profiled list with 3 contacts per company
2. One page, personalized, cover letter.
3. One page, personalized, survey
4. Yellow Business Reply or Self Stamped #10 Envelope
5. One page, 8.5 x 11 flyer or collateral piece
6. 9 x 12 outside envelope – white or gray
7. 3.5 x 5 label
8. \$2 Bill with gold paperclip

Here is the copy of the letter, which is written in ZapfHumnst BT type font, which has been tested; use it or something similar, it works!

Company logo

Date

Name  
Title  
Company  
Address  
City, State Zip

Dear [name],



**Complimentary Sleeve of  
Titleist® golf balls.  
Respond by March 5<sup>th</sup>.**

At **ABC Company**, we continue to look for ways to better understand how (your service or product) can improve the (operations or efficiencies or some job function) of (job title here like, Managers and Directors) like you. In fact, we are building our service offerings around the needs of professionals like you.

Your opinion on how we structure our (solution like, Payroll services) solutions is extremely valuable to us.

That's why we would like your input on the enclosed **2012 (solution name like Payroll Services) Survey**. And, although I know \$2 doesn't even begin to cover your time, we are including the \$2 Bill as a small appreciation of your help.

- The survey is just 7 simple questions.
- Most of the questions can be answered by simply checking off a box. It should only take 2 to 3 minutes to complete.
- When you have completed the survey, simply place it in the enclosed pre-paid envelope and drop it in the mail, or fax it to me at 800-444-4444.

Please complete the survey and return it to me by **March 5<sup>th</sup>** if you could. We plan to complete this survey analysis within the next two weeks, so if you could take just a few minutes, right now, and fill out the survey, I would greatly appreciate it.

Thank you,

*Matt*

**Matt Minarik,**  
VP Marketing  
123-456-7890

P.S. If you return the survey within the next 10 days, by **March 5<sup>th</sup>**, I will get you a sleeve of Titleist golf balls for returning the completed survey. Thanks for helping us complete this all important survey.

[Address](#)  
[website](#)

Here is the text of the above letter:

-----  
Date

Name

Title

Company

Address

City, State Zip



***Complimentary Sleeve of  
Titleist® golf balls.  
Respond by March 5<sup>th</sup>.***

Dear [name],

At **ABC Company**, we continue to look for ways to better understand how (your service or product) can improve the (operations or efficiencies or some job function) of (job title here like, Managers and Directors) like you. In fact, we are building our service offerings around the needs of professionals like you.

Your opinion on how we structure our (solution like, Payroll services) solutions is extremely valuable to us.

That's why we would like your input on the enclosed **2012 (solution name like Payroll Services) Survey**. And, although I know \$2 doesn't even begin to cover your time, we are including the \$2 Bill as a small appreciation of your help.

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Thank you,

*Matt*

**Matt Minarik,**  
VP Marketing  
123-456-7890

P.S. If you return the survey within the next 10 days, by **March 5<sup>th</sup>**, I will get you a sleeve of Titleist golf balls for returning the completed survey. Thanks for helping us complete this all important survey.

-----

If you notice, there is not much in this letter about what the company does. The letter is focused on getting the person to complete the survey and in giving them the \$2 Bill and the sleeve of Titleist Golf Balls.

The \$2 Bill pulled better response than a \$1 Bill and equal response (sometimes better) to a \$5 Bill and 50% of the time it pulled an equal response to the new Presidential \$1 Coins.

In terms of golf balls, Titleist pulled the best response over any other brand of golf ball, and with male audiences, golf balls always pull the best response.

With younger (under 35) audiences, we had great success in using iTunes gift cards.

### **The survey.**

The survey needs to be one page and it should be 7 questions long although we get away with up to 10 questions.

The survey needs to answer the BANT questions (discussed earlier).

The survey needs to be in ‘ranking’ order and I use a scale of 1 to 5 for my ranking. Although pure statisticians will use 1 to 10, I find it crowds the survey too much and you get a survey that is tougher to read and so you get a lower response. The goal of this survey is to ‘get a date’ and not a sale. We are just in the ‘Introductory’ phase of the offering here.

Here is an actual sample we did for an accounting firm that is seeking out owners that want to buy or sell their business.

Here is the pdf of the survey, and then printed out so you can see it and copy it.

Inner Circle  
Capital Advisors

## Business Succession Survey



«FULLNAME»  
«TITLE»  
«COMPANY»  
«ADDRESS»  
«CITY», «STATE» «ZIP»

Contact Information if different :  
Name \_\_\_\_\_  
Title \_\_\_\_\_  
Company \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

[NOTE: This survey is completely confidential and will not be shared with any one.]

- How seriously have you looked into selling your business?  
1  Never 2  Thought about it 3  Talked about it 4  Looked into it 5  Serious Examination
- How much of an exit strategy do you have in place now?  
1  None 2  Thought about it 3  Talked about it 4  Informal plan 5  Serious strategy in place
- If you are looking to sell your business, when are you looking to pursue this?  
1  Never / not considering 2  This year 3  1 – 2 years 4  3 – 5 years 5  > 5 years
- If you were looking to sell your business, please indicate your level of comfort or confidence at your ability to properly negotiate the deal to gain maximum sale price?  
1  No confidence / comfort 2  3  4  5  Fully confident / comfortable
- Overall, what has the trend of your industry, within your geography, been over the last 3 years:  
1  Not sure 2  Declining 3  Flat 4  Increasing
- Over the last 3 years, how profitable has your business been?  
1  Prefer not to answer 2  No profit 3  Low profit 4  Some profit 5  Strong profit
- Do you have any family members who are currently looking to take over the business?  
1  Not sure 2  Yes 3  Maybe 4  No
- How well can your business run without you there?  
1  Not sure 2  Very well 3  OK 4  Shaky 5  Can't run without me
- How interested would you be in a free, confidential, discussion about the value of your business and the options you have with it?  
1  No interest 2  Low interest 3  Not sure 4  Interest 5  Strong Interest

*Thank you!* Please fax to 216-236-7464 or place in postage paid envelope and return by January 27<sup>th</sup> to receive your *Free Titleist Golf Balls*. Thank you for your help in this important survey.

«FULLNAME»  
«TITLE»  
«COMPANY»  
«ADDRESS»

«CITY», «STATE»«ZIP»

Contact Information if different :
Name _____
Title _____
Company _____
Address _____
City _____ State ____ Zip _____

**[NOTE: This survey is completely confidential and will not be shared with any one.]**

1. How seriously have you looked into selling your business?  
1  Never 2  Thought about it 3  Talked about it 4  Looked into it 5  Serious Examination
2. How much of an exit strategy do you have in place now?  
1  None 2  Thought about it 3  Talked about it 4  Informal plan 5  Serious strategy in place
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1  Never / not considering 2  This year 3  1 – 2 years 4  3 – 5 years 5  > 5 years
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5. Overall, what has the trend of your industry, within your geography, been over the last 3 years:  
1  Not sure 2  Declining 3  Flat 4  Increasing
6. Over the last 3 years, how profitable has your business been?

1  Prefer not to answer    2  No profit    3  Low profit  
4  Some profit    5  Strong profit

7. Do you have any family members who are currently looking to take over the business?

1  Not sure    2  Yes    3  Maybe  
4  No

8. How well can your business run without you there?

1  Not sure    2  Very well    3  OK    4  Shaky  
5  Can't run without me

9. How interested would you be in a free, confidential, discussion about the value of your business and the options you have with it?

1  No interest    2  Low interest    3  Not sure    4  Interest  
5  Strong Interest

*Thank you!* Please fax to 216-236-7464 or place in postage paid envelope and return by January 27<sup>th</sup> to receive your *Free Titleist Golf Balls*. Thank you for your help in this important survey.

---

Here is a survey that has the budget element directly approached in question #6: This got a 14% response. We mailed to just 211 people and we got 30 responses and 5 appointments. This was successful.



**MRK**  
TECHNOLOGIES.com  
as good as I.T. gets

## IT Solutions Trend Survey




**John Johnson**  
CIO  
Bob's Bank of Texas  
1234 Bobber Street  
Waco, TX 78990

Contact Info is different, see below:  
 Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Address: \_\_\_\_\_

**Free Titleist Golf Balls  
and Ping Golf Shirt –  
Reply By June 18<sup>th</sup>  
– see below!**

1. How confident are you that your Network Security strategy will be adequate for your organization's security and compliance requirements for the next 12 months?  
 No confidence     Unconfident     Unsure     Confident     Very Confident
2. Over the course of the next 12 months, please indicate the **Most important** IT security solutions you are considering to either install or upgrade (please check all the most important ones):  
 Password Management     Encryption     e-Mail security     Data leakage  
 Network Security     Remote user security  
 Compliance for regulations for SOX, PCI, HIPAA, GLBA  
**Endpoint Security:**  
 Malware / Adware     Policy Abuse     Personal Firewall     Antivirus     Unwanted Applications
3. Over the course of the next 12 months, please indicate all the IT Data Storage solutions you are considering to either install or upgrade (please check all that apply):  
 Server Virtualization     Content archival     Tiered storage     Disaster Recovery  
 PC Virtualization     Consolidation     Replication     Data deduplication  
 Recovery Time Objective (RTO)     Recovery Point Objective (RPO)
4. Wide Area Network (WAN) Application Acceleration is gaining in popularity because it enables centralization of servers and storage, and increase application performance to remote locations. How much are you considering implementing WAN Application Acceleration for your organization over the next 12 months?  
 No consideration     Slight consideration     Considered     Good consideration     Extreme consideration
5. Please rank the importance of having your mobile workforce laptops (PCs) perform at the same speed and efficiency (while remote) as those of your current in-office desktop PCs.  
 No importance     Slight importance     Important     Good importance     Extreme importance
6. Please indicate the approximate amount you have budgeted for all your software and IT services through 2009: (please exclude hardware)  
 Less than \$50,000     \$50,000 to \$100,000     \$100,000 to \$250,000     Over \$250,000
7. What is your timeframe for implementing any IT solutions around the above mentioned solutions?  
 0 – 3 mos.     3 mos to 6 mos     6 mos. To 12 mos.     Over 12 mos.
8.  **Yes**, I would like a FREE PING GOLF SHIRT! In order to receive my FREE PING GOLF SHIRT, I agree to a 15 minute meeting to review my survey responses.     **No Thank you.**

*Thank you for responding!*

Please either fax back to 800-440-7417 or place in Postage Paid Reply Envelope and return by June 18<sup>th</sup>, 2009 to receive your **FREE Titleist Golf Balls**. And if you agree to review the survey in person for just 15 minutes, we will give you a **FREE Ping Golf Shirt** – Retail value of \$65.00!

Here is the text of this survey (copy it directly if you want).

## IT Solutions Trend Survey



*Free Titleist Golf Balls and Polo  
Golf Shirt – Reply By June 18<sup>th</sup>  
– see below!*

John Johnson  
CIO  
Bob's Bank of Texas  
1234 Bobber Street  
Waco, TX 78790

Contact Info is different, see below:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

- How confident are you that your Network Security strategy will be adequate for your organization's security and compliance requirements for the next 12 months?**  
 No confidence    Unconfident    Unsure    Confident    Very Confident
- Over the course of the next 12 months, please indicate the Most Important IT security solutions you are considering to either install or upgrade (please check all the most important ones):**  
 Password Management    Encryption  
 e-Mail security    Data leakage  
 Network Security    Remote user security  
 Compliance for regulations for SOX, [PCI](#), [HIPAA](#), [GLBA](#)  
**Endpoint Security:**  
 Malware / Adware    Policy Abuse    Personal Firewall

- Antivirus     Unwanted Applications
- 3.    **Over the course of the next 12 months, please indicate all the IT Data Storage solutions you are considering to either install or upgrade (please check all that apply):**
  - Server Virtualization                       Content archival
  - Tiered storage                               Disaster Recovery
  - PC Virtualization                           Consolidation
  - Replication                                   Data deduplication
  - Recovery Time Objective (RTO)
  - Recovery Point Objective (RPO)
- 4.    **Wide Area Network (WAN) Application Acceleration is gaining in popularity because it enables centralization of servers and storage, and increase application performance to remote locations. How much are you considering implementing WAN Application Acceleration for your organization over the next 12 months?**
  - No consideration     Slight consideration
  - Considered                       Good consideration
  - Extreme consideration
- 5.    **Please rank the importance of having your mobile workforce laptops (PCs) perform at the same speed and efficiency (while remote) as those of your current in-office desktop PCs.**
  - No importance     Slight importance     Important
  - Good importance     Extreme importance
- 6.    **Please indicate the approximate amount you have budgeted for all your software and IT services through 2009: (please exclude hardware)**
  - Less than \$50,000                       \$50,000 to \$100,000
  - \$100,000 to \$250,000                       Over \$250,000
- 7.    **What is your timeframe for implementing any IT solutions around the above mentioned solutions?**

- 0 – 3 mos.                       3 mos to 6 mos  
 6 mos. To 12 mos.            Over 12 mos.

8.     ***Yes, I would like a FREE PING GOLF SHIRT! In order to receive my FREE PING GOLF SHIRT, I agree to a 15 minute meeting to review my survey responses.***     ***No thank you.***

*Thank you for responding!*

Please either fax back to 800-440-7417 or place in Postage Paid Reply Envelope and return by June 18<sup>th</sup>, 2009 to receive your FREE Titleist Golf Balls. And if you agree to review the survey in person for just 15 minutes, we will give you a FREE Ping Golf Shirt – Retail value of \$65.00!

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Next is an example of a test that didn't produce good results. When you do your 'offer', make sure it doesn't look like a 'bribe', like this did. It got just a 2% response.



**One Dozen  
Titleist® Golf Balls  
– Free!**

June 8, 2009

Mr. Jeff Gessler  
President  
Lapis Business Solutions  
4340 Lloyd Road  
Wickliffe, OH 44301

*Yes!* I would like to see the results from the Arrow Electronics Market Intelligence Study on IT and Business Priorities and Trends for 2009

*Yes!* I do agree to a short meeting within the next 4 weeks to discuss the study.

*Yes!* I would like a dozen Titleist golf balls and I understand that this does not commit me to buy or purchase anything at any time in order to receive the golf balls.

Please call me at this number to set up a time to meet: \_\_\_\_\_

My e-mail is: \_\_\_\_\_  
(all privacy maintained)

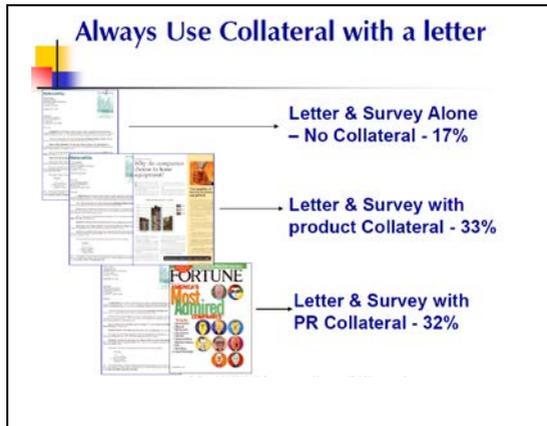
Thank you. Please place in enclosed reply envelope and mail back or fax to 800-440-7417.

2401 Superior Viaduct, 2nd Floor Cleveland, OH 44113  
Ph: 216-535-4100 Fax 800-440-7417 john.tookman@mrktech.com www.mrktech.com

A

## The Importance of the Collateral:

Collateral is anything that goes with the main piece; i.e., the brochure. With National City Bank's work, we were mailing out 10,000 pieces at a time and we were trying to find out any way we could to save costs. So we wondered if the offer was strong enough that we could just eliminate the brochure or collateral. Also we wanted to find out what kind of collateral we should use, if any. So we tested three different ways:



Test 1 – No collateral

Test 2 – Collateral relating to the product

Test 3 – PR Collateral relating to the bank and not the product

As you can see, it made almost no difference (and none, statistically speaking) in what we included, but it was

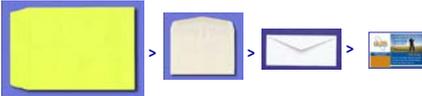
significantly important to include something in the survey and letter. In fact it increased response by almost 100% (recall that even though the creative is the least important element, there are some things that will improve the response by 100%).

Thus you have to have a collateral or flyer or brochure piece of some type in the Gold Mailing.

If doing direct mail (and for B2B I recommend it) always use a large, 9 x 12 envelope. In fact, the larger the envelope you use, then the better the response you will get.

Hi-Q-group

**Bigger is Better**



A 9 x 12 envelope pulls about 20% better than a 6 x 9 which pulls about 20% better than a #10 envelope (which pulls about 100% better than a postcard).

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For whatever reason, each time you use the next successively larger envelope, you will get about a 20% better response. So if you are going to get a 10% response with a # 10 envelope, then you will get a 12% with the 6 x 9 and a 1.45% with a 9 x 12!

We also always use yellow Business Reply Envelopes when possible, too. And, probably because they stick out more, yellow Business Reply Envelopes pull about a 15% to 20% better response than white ones do. We tried a hot pink reply envelope and that didn't work (surprise, surprise). Since the yellow envelope worked, we tried a survey on yellow paper and that did not work any better than the white one either (in fact, if I recall, it may have pulled worse).

Hi-Q-group



**A Yellow BRE (Business Reply Envelope) pulls about 20% better than a white one.**

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For Business-to-Business niche mailing, ALWAYS use Life First Class Stamps. Don't EVER use Bulk Mail or even a First Class Indicia – they just don't look personal, and they aren't. They are just 'junk' and will be treated that way.

The bottom line for direct mail is to make is one on one as much as possible. Here are the 5 key rules to B2B direct mail:

Hi-Q-group

## 5 Key Rules of What Works in B2B Direct Mail.

1. Letters with collateral almost always pull 100% better than self mailers.
2. Live First Class Stamps ALWAYS are worth it! (up to 200% better response)
3. Mailing to multiple titles gets maximum penetration to targeted companies.
4. The larger the envelope, the better the response.
5. Have a killer introductory offer.



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## **BANT(A):**

Whenever we do Business to Business lead generation direct mail, we almost always do a survey that tries to do always get a ‘qualified’ lead. A qualified lead has five criteria. We call it BANTA Criteria:

- Budget
- Authority
- Need
- Timing
- Appointment

So a lead is qualified if you know the budget, the authority of the person (a decision-maker), the Need, and the Timing. If you can get an appointment, then it is really a super qualified lead!! This survey accomplishes all that!

Did it work? How is \$168 Million in new revenue annually?

“I had a great experience working with Matt and Hi-Q when I led the National City Bank marketing efforts directed at business. Matt’s knowledge of marketing overall and of direct mail specifically was the difference between feeling our way through the weeds for a couple of years and getting directly to a successful program. He helped us build and quickly refine our mailing and increased our response rates from an

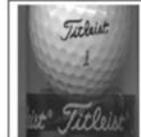
impressive 8% to a stunning 30%. We even had one test cell that had a 56% response rate one year. Working with Matt, we took a small budget and a niche program and built it into a powerhouse that delivered and tracked over 130 high quality leads to each of the 1,100 branches each year. Historically the branches had been shipped hundreds of pages of addresses, but our program provided leads in a manageable group of 10-15 fresh leads per month with the information to act and win business. The program expanded quickly and was generating more than \$168 million in new business annually within three years.”

Brad Hemstreet  
Former Senior Vice President,  
Corporate Banking Marketing  
National City Bank

The next page shows another full survey so you can see how it arrives at the elements of the BANT and the Appointment. What happens when you ‘ask for the appointment is that you get a little lower response rate, but you actually get people saying ‘yes’ to the appointments! You get ‘LEADS’!



**Data Backup and Recovery Solution Survey**



**Free Titleist® Golf Balls!**

John Johnson  
CIO  
Bob's Bank of Texas  
1234 Bobber Street  
Waco, TX 78990

Contact Info is different, see below:

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

1. Please rank your overall satisfaction regarding your current backup and recovery solution?  
 1 Very Dissatisfied     2 Dissatisfied     3 Neutral     4 Satisfied     5 Very Satisfied

2. Please check off the amount of time your IT admin spend with backup / restore activities?  
 1 Extreme time     2 Significant time     3 Normal time     4 Some time     5 No time

3. How often does your company meet your current data back-up window time?  
 1 Never     2 Not too often     3 Sometimes     4 Every time     N/A

4. How often do you currently backup your data?  
 1 Never     2 Daily     3 weekly/ bi-weekly     4 monthly     5 Other \_\_\_\_\_

5. How satisfied are you with your overall current backup solution (hardware & software)?  
 1 Very Dissatisfied     2 Dissatisfied     3 Neutral     4 Satisfied     5 Very Satisfied

6. How do you currently back up / store your data? (please check all that apply)  
 1 Don't     2 Consolidated disk     3 Tape     4 Enterprise  
 5 CD Rom     6 SAN     7 NAS     8 Other \_\_\_\_\_

7. What is your company's current time-frame for updating your Storage / Recovery Systems?  
 1 - 3 mos     3 - 6 mos     6 - 12 mos     >12 mos     Not considering

8. Please indicate the approximate amount you have increased budgeting for any hardware / software / services for improving data and disaster recovery for each of the periods below:  
 3rd Qtr 2002     Less than \$50,000     \$50,000 to 250,000     Over \$250,000  
 4th Qtr 2002     Less than \$50,000     \$50,000 to 250,000     Over \$250,000  
 all of 2002     Less than \$50,000     \$50,000 to 250,000     \$250,000 to 500,000     > \$500,000

9. Would you like to attend a FREE Executive Breakfast hosted by IBM on *'The Latest Trends in Storage and Disaster Recovery?'*  
 Yes     No     Would like more information; e-mail: \_\_\_\_\_

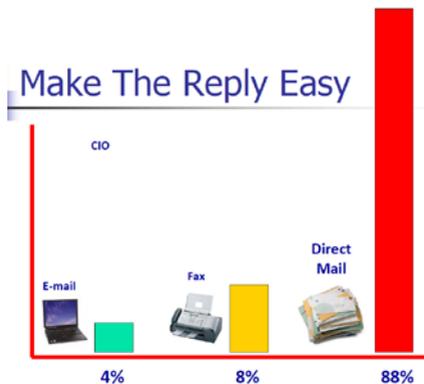
*Thank you for responding!*

Please either fax back to 800-440-7417 or place in Postage Paid Reply Envelope and return by July 19<sup>th</sup>, 2002 to receive your FREE Sleeve of Titleist Golf Balls.

**Make the Reply Easy:**

Whether doing e-marketing or direct mail, or anything, you have to make the reply easy. Even when surveys are done to CIOs, the ones who use the computers the most, it is still easier for them to reply by a direct mail than by an electronic format.

It takes about 3 to 5 times longer to complete an electronic survey than it does a direct mail paper survey. By the time you click the buttons (just right) and move on, and by the time the page is loaded, you have easily scanned and completed the direct mail survey. And you can complete the direct mail survey ANYWHERE, so your odds of getting a response are higher. How much higher, you might wonder? I did too, and so I tested this and here is the answer:



The direct mail was 11 times easier than a fax and 22 times easier than an electronic format! When we do surveys by e-mail or electronic version, we get a 2% to 4% response

and when we do them by direct mail we get 10% to 20% - that is 500% better response – and the reason why is because it is easier for them to reply.

## **Why Surveys?**

Surveys do many great things and they have yet to fail over 25 years. The genesis of this comes from the gurus in the direct mail fund raising business who were using surveys back in the late 1960's and are still using them today.

Surveys use something we call an 'Involvement Technique' – that is, 'it gets the reader 'involved' in the letter. Now in today's social media marketing, we call it 'engagement', which is the same thing; get the reader 'engaged' in your copy and content. Surveys take the place of the face to face meeting where the sales person asks all the same questions. It is a simple and clever way to get the same info much easier.

The chart below shows what I did for IBM in 2001 that got me the top award for marketing. I mailed nearly 15,000 surveys and received an average of 21.1% response, which came to 2,736 responses. It was just 10 programs. The average revenue opportunity out of each survey was \$103,672, and that comes to a total revenue opportunity of nearly \$284 Million dollars!

This was done in just one quarter for IBM!

	IBM			
	Total Mailed	Total Responses	% Response	Opp \$ Per Response
Data Storage Survey	1410	190	17.78%	\$104,211
eCommerce Survey	1500	278	19.65%	\$133,993
Doc Mgt. Survey	866	155	18.94%	\$141,935
Info Tech Survey	3843	645	18.46%	\$143,372
Messaging Survey	680	164	25.64%	\$152,896
Web Survey	264	95	34.40%	\$173,158
Collaboration Survey	251	63	25.10%	\$18,571
SAE Trade Show Survey	4000	669	16.73%	\$1,704
CRM Survey	256	28	10.94%	\$123,214
Government Survey*	1923	449	23.35%* (70%)	N/A
<b>Totals</b>	<b>14993</b>	<b>2736</b>	<b>21.10%</b>	<b>\$103,672</b>

Not only did we get a lot of opportunity, but we had tons of data to know where the marketplace was moving toward! We knew the IT budgets of nearly 3,000 companies! We knew their degree of interest in our offerings – it was a truly remarkable campaign. The ad agency for IBM didn't like anyone but them doing lead generation, and so the program was nixed by IBM. When they rolled out their programs, they would get ½ of 1% response and they made millions – go figure!

### **Relationship:**

Earlier we discussed about ‘sitting on the front porch’ in regards to the offer. The great thing about surveys is that no one is trying to sell you anything. They just want your opinion and you get something for it! It ‘starts’ the trusting relationship.

Most sales happen in the 5<sup>th</sup> to 12<sup>th</sup> touch, and this is just touch # 1 – it’s a nice way to begin a relationship.

### **How To Make Brochures and Collateral.**

When we did those campaigns for IBM, we did them through our business partners and oftentimes these are guys who started in their basement in the early 90’s and just grew and grew as demand increased. They never had any brochure or anything and so we would just use Microsoft Publisher and create a brochure for them in about 1 hour. They weren’t pretty, but they were functional. Here is a sample one – it’s pretty ugly, but this still got over a 17% response!

# Solution Technology Inc.

## *eBusiness Strength = Profits for You!*

### *Powered by IBM Solutions*

*IBM, The World's Largest IT Company Because IBM Solutions Work For Your Success*



Today, successful e-business strategies depend on the strength and flexibility of the underlying I.T. infrastructure to support your strategy. You need a highly available, manageable, and scalable information technology infrastructure from a team that can provide you with a complete portfolio of products and services including hardware, software applications and e-business application expertise.



#### Testimonial:

"I was amazed at what STI said they could do with IBM's technology and then actually did. Their Collaboration solutions increased our productivity immensely. Not only did we become more efficient, but our staff is working better as a unit. Great people, great pricing, amazing results; I recommend them to anyone."

Will Costa, Jaycox Corporation.

That team is Solution Technology, Inc. As an award-winning IBM Premier Business Partner with hundreds of years of combined industry experience, STI has the knowledge, the experience and the power to get you where you need to be to maintain your competitive advantages.



Headquarters, Indianapolis, IN  
9229 Delegate's Row, Suite 150  
Indianapolis, IN 46240

888.532.7239 - toll-free  
317.575.8220  
317.575.8221 - fax  
solutiontechnology.com



#### E-business

It's easy to make Web sites. It's a lot harder to move business processes to the Web. IBM's WebSphere is built to do just that. Using WebSphere, you can integrate your existing middleware and systems, such as IBM CICS®, IBM MQSeries®, IBM IMS products and SAP R/3. Built on an open Java standard, WebSphere is an unbeatable foundation for maintainable, easily-created commercial Web sites.

#### High Availability

How can you achieve both high server availability and low cost? With clustering software from IBM. Clustering puts incredible flexibility and reliability into your hands. Lose only minutes, not hours, if a server fails.

#### Storage and Disaster Recovery

Tivoli Storage Manager and Veritas Net.Backup offer smooth and reliable backup, archival storage, restoration, and disaster recovery.



## Brochures and Collateral

---

- Talk About 'Their' Needs (not about you)
- Design them the 'Trust' perspective:
  - Results, Competency, Character
- Answer Q's/ Overcome Objections
- Lead through logical 'flow'
- Use Graphics a lot
- Serif Font (Times Roman vs Arial)
- Tell them what you want them to do
- Focus on Establishing Trust and Building Credibility
- Use Testimonials

Did we use a graphic designer? No. Was it really good looking? No. Did it work? Yes. And it worked because of two things.

First, as you recall from the National City Bank test on collaterals; it doesn't matter what you have as long as you have 'something' in the form of collateral. Second, if you had just 3 of the 5 elements of the Trust Star, that you would do well. You need to have Results, Competency, and some kind of Character testimony. So the business partner would simply do a 3 column brochure with one column talking about their ROI, and the second column talking about all their IBM and

other Certifications, and the third column had either their mission statement or a testimonial. And that was it. So, when you do a brochure, make sure it has those three elements and all five of the trust elements (Insight and Relationships are the last two).



## **Chapter 9:**

### **Other Marketing Guidelines To Generating Leads:**

Recall there are dozens of ways to generate leads. There is no one, single way to generate leads. Search Engine Optimization and it's sister, Search Marketing, Direct Mail, Social Media, Telemarketing, Networking, Tradeshow and other. If you look, you will find a book on each of these means. We'll cursorially address some of these other ones now.

#### **Trade Show Marketing.**

Are trade shows dead? Well, they sure took a hit over the last couple of years from 2008 to 2010, but they are not dead by any means. In fact, some of our greatest trade show marketing results came during those years. Back in 2002, one IBM Business Partner got 100% response to a trade show from the marketing efforts shown here. However, like anything else, you get out of them what you put into them.

A good article on trade show marketing by Bartizan Connects claims 5 things you need to do for successful trade show marketing.

### **5 Innovative Ways To Be Remembered At Your Next Tradeshow**

**1. Tell a Story-** From the time we were little kids we learned through the stories we were told. Nothing has changed. Share with your attendees a story that illustrates how and why your company can make a difference. You are now showing, rather than telling. Some call this is a “case study”. I call it a story. We all love stories.

**2. Show Credibility-** Be the person others turn to for newest and effective business tips. You become the trusted source to whom people turn to learn about critical information. People will want to buy from a company they know is highly credible and an expert

in its field. This will generate buzz about your company.

**3. Keep it Simple-** Walter Isaacson’s biography, “Steve Jobs”, notes Jobs constant recognition of Leonardo Da Vinci’s words, “Simplicity is the ultimate sophistication.” Bombarding attendees with an overload of information about your product or service will provoke disengagement. Think back to when you were in school. When a teacher or professor taught a class, she would break the overall subject into various sub- divisions. From there you would focus on one theme at a time. This is true with exhibits. Focus on one main theme and then work your entire presentation around it. This will be more inviting and far less intimidating for attendees. It makes things simple, clear and to the point, and in turn helps you sell more. Focus on only a couple products or services and discuss 3 main points.

**4. Create an Experiential Brand Experience-** Provide demos and allow attendees to share an experience with your brand. People will be more inclined to remember an experience rather than a sales pitch. Put your products in the hands of potential customers. If selling a service, provide

demos. This may be an obvious suggestion, but for some reason, many overlook it. Interact with your attendees and give them a reason to not want, but need what you are offering.

**5. Have Fun-** Tradeshows are all about face- to- face interaction and networking with existing customers, prospective customers and important industry leaders. Be proactive and attentive to the people with whom you speak. Transmit a fun, energetic vibe that will attract others to your booth. Educate people by sharing with them how your product or service will make their life that much easier and business that much more successful. Tradeshows enable you to check out the latest trends buzzing in your industry. This demonstrates that you are an innovative company and ultimately a credible source.

You can find the article and more about them at [here](#).<sup>xvii</sup>

A successful method for trade show marketing is using surveys. It's not too surprising to mention the use of surveys for the trade shows. But it's important to also combine database profiling, too.

Here is the step by step process to use to get leads and responses for trade shows. It is a similar process to the direct mail process but it is a little more involved.

## 10 Steps To Successful Trade Show Marketing:

# Trade Show Marketing

1. Create Theme
2. Get Attendee List
3. Mail Letter Ahead –
  - Give map and coupon for gift
4. Call everyone to tell about gift
5. Have gift at booth for survey
  - B.A.N.T. qualify
6. Do presentation to establish as 'expert'
  - Have drawing for 'big' gift.
7. Follow-up in 48 hours



Step 1 – Pick a theme – but don't go crazy like having Tarzan or anything crazy. Just pick a theme so that people can 'remember' you better.

Step 2 - See if you can obtain the preregistered attendee list for the show. If you can that is the best. But if you can't then see if you can get last year's attendees, as the odds are great that at least 70% will attend again. And if the show is from an Association, then use the membership list.

Step 3 – Now create a survey for the people coming to the show. When you create surveys, make sure you use ranking style questions, and even though many statisticians like to use

a rank of 10 for the answers only use 5 (scale from 1 to 5) as a scale of 1 to 10 is too crowded on the page and decreases response. Since we are only looking to establish a relationship and get a general feeling of the needs of the prospect, we don't need to be scientific in our survey.

Also remember when doing a survey to make the questions easy and very high level. Too many sales people want to get very detailed in the survey (If I can get this info then we got 'em!). If a survey is too detailed, then no one fills it out and you have nothing.

On the next page is a survey we did for TechTeam Global.

-----  
"With amazing response rates of 15% to 20%, we actually got to the point of having more leads than we could follow-up with.

*Bill*

William Riley  
Director of Marketing  
TechTeam Globa



### Hospitality Industry Technology Survey



\$10 iTunes gift card & drawing for a new Apple iPad!!

Fullname \_\_\_\_\_  
 Title \_\_\_\_\_  
 Company \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State Zipcode \_\_\_\_\_

Contact information if different:  
 Name \_\_\_\_\_  
 Title \_\_\_\_\_  
 Company \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

1. Which of the following IT projects/upgrades are you planning for deployment in 2010? (check all that apply)
 

<input type="checkbox"/> Help Desk Improvements	<input type="checkbox"/> POS or PM Systems	<input type="checkbox"/> Order Entry System
<input type="checkbox"/> Improved Security Systems	<input type="checkbox"/> Sales & Catering	<input type="checkbox"/> Labor Mgmt / Scheduling
<input type="checkbox"/> Inventory & Revenue Management	<input type="checkbox"/> Kiosks	<input type="checkbox"/> In-room Technology & Access
  
2. To what degree have you considered out-sourcing or out-tasking any planned technology rollouts including training of your hospitality staff?
 

<input type="checkbox"/> No Interest	<input type="checkbox"/> Under Consideration	<input type="checkbox"/> Planning / RFP Stage	<input type="checkbox"/> Currently Outsource
--------------------------------------	--	---	--
  
3. How important do you believe outsourcing is, to improve the overall efficiency of your help desk?  
 1  Not Important    2     3     4     5  Very Important
  
4. How much of your IT Services are currently outsourced?  
 1  None    2  <10%    3  10%-50%    4  50%-75%    5  >75%
  
5. What are your biggest challenges and issues with outsourcing? (please check all that apply)
 

<input type="checkbox"/> Understanding our Business Goals	<input type="checkbox"/> Ramping Up to Speed	<input type="checkbox"/> Staff Turnover
<input type="checkbox"/> Contract Flexibility	<input type="checkbox"/> Overstated Capabilities	<input type="checkbox"/> Pricing Flexibility
<input type="checkbox"/> Geographical or Language Limitations	<input type="checkbox"/> Lack of flexibility and alignment with our culture and needs	
  
6. Please check the top IT services and technologies where you would like to see improvement. (please check all that apply)
 

<input type="checkbox"/> Help Desk Issues	<input type="checkbox"/> Tech training of hospitality staff	<input type="checkbox"/> Back Office Systems
<input type="checkbox"/> POS or PM Systems	<input type="checkbox"/> Distribution	<input type="checkbox"/> Training manuals
<input type="checkbox"/> Asset Mgmt	<input type="checkbox"/> Rolling out new technology or upgrades	
<input type="checkbox"/> Network/Server Monitoring and Administration		
  
7. How satisfied are you that your past technology rollouts were implemented quickly and correctly?  
 1  Very Satisfied    2     3     4  Unhappy    5  Actively Seeking Help
  
8. How many properties / locations do you support and maintain domestically and / or globally?  
 0 - 250    250 - 500    500 - 1,000    1,000 - 5,000    > 5,000 locations  
 Type of properties:  Economy     Ful Svc. / Resort     Extended Stay     Boutique  
 (check all that apply).
  
9. What is the timeframe for your next technology roll out?  
 None planned     In process     2010 / 2011     2-3 years     3+ years

Your Phone: \_\_\_\_\_ Your E-Mail Address: \_\_\_\_\_  
(all privacies maintained)

*Thank you!* Please Fax to 800-440-1413 or place in Business Reply Envelope and return by June 7<sup>th</sup> – and be sure to pick up your Free \$10 iTunes Gift Card and be entered to win a free iPad at the TechTeam Global Booth #xxx at HiTEC. Thank you for your help in this important survey.

Form 500-00000

Step 4 – Think of 2 good offers. A) one offer when they get the survey; i.e., a \$2 bill inside the envelope. And, B) an offer for later on. A drawing for an iPad or something like that.

Step 5 – e-mail them to tell them a Trade Show survey is coming and it has money in it so watch for it!

Step 6 – Call them and tell them an envelope with money in it is coming and so don't throw it out.

Step 7 – Write a good letter that says, 'if you are coming to the ABC show to complete this survey and we will have your prize at the booth. Include a map and booth number for the reader so they can find you – See Next Page for the letter.

Step 8 – Call them again and ask if they got the survey.

Step 9 – e-mail a follow up.

Step 10 – As bad as this sounds, hire pretty girls to work the booth- pretty girls are more important than good looking guys (guys are so easy). And even promote them in the mailings.

Then at the show you will get a good response to your booth. How good?

This works and it works well.



February 5, 2010

Name  
Title  
Company  
Address  
City, State Zip



*Complimentary \$10 iTunes gift card -  
respond by February 17<sup>th</sup> - Also a  
drawing for a new Apple iPad!!*

Dear [name],

If you are planning to attend this year's FS TEC 2010 Conference on February 21st – 24th, in Long Beach, then I hope to see you there and I will have a gift for you.

At TechTeam Global, we're always looking to improve our IT services and develop new offerings to reduce operating costs and meet the increasing technology needs of food service managers and personnel. To help us plan for changing strategies and expectations, we are conducting a survey on current industry needs with food service professionals like you.

That's why we would like your input on the enclosed **2010 Food Service Industry Technology Needs Survey**. And, although I know one dollar doesn't even begin to cover your time, we are including a new uncirculated golden Presidential \$1 coin as a small appreciation of your help.

- The survey is just ten simple questions.
- And most of the questions can be answered by simply checking off a box. It should only take 2 to 3 minutes to complete.
- When you have completed the survey, simply place it in the enclosed pre-paid envelope and drop it in the mail, or fax it to me at 800-440-1413.

Please complete the survey and return it to me by **February 17<sup>th</sup>**, and we will have a **\$10 iTunes gift card** for you to pick up at our booth (#532) at FS TEC 2010. We plan to complete this survey analysis prior to the conference, so if you could take just a few minutes, right now, and fill out the survey, I would greatly appreciate it.

Thank you,

*Bruce*

Bruce Travis, Senior Account Executive  
404-556-9600



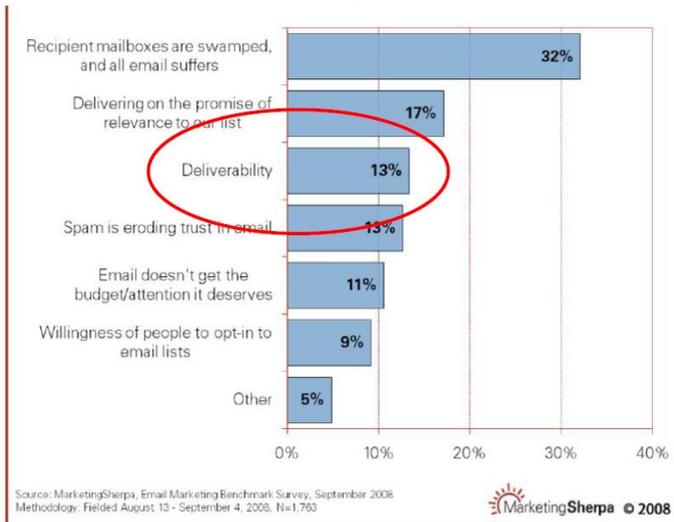
P.S. If you return the survey by **February 17<sup>th</sup>**, you will also be entered into a *drawing for the hot, new Apple iPad*. So please return your survey promptly and don't forget to stop by **Booth #532** to pick up your **\$10 iTunes gift card** and **enter to win the iPad!** If you are not going to be at the show this year, I will still get you your **\$10 iTunes card** for returning the completed survey.

TechTeam Global, Inc. 27335 West 11 Mile Road Southfield, MI 48033, U.S.  
Main: 800-522-4451 [www.techteam.com](http://www.techteam.com)

## e-Mail Marketing Guidelines.

Prospect e-mail marketing is dying. Way back in 2008 Marketing Sherpa had only 13% of prospect e-mails being opened up then and now it is worse as it was expected to drop by as much as 20% per year!

## How Much of e-mail is Delivered and Opened?



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People still do e-mail prospect marketing because ‘it’s cheap’ – I am not in favor of prospect e-mail marketing as a stand-alone. There is too much spam and too many people can get your e-mail address. E-mail marketing can still

work if the offer is good and it is backed up by other marketing such as direct mail and telemarketing, and you associate it with a trusted brand, then you can use it for prospect marketing.

Using it with a brand is perhaps the single most important thing to do to ensure some success. Here are two subject lines with the same offer and you can see that the one with the IBM brand is more credible”

Subject Line: Free Titleist Golf Balls for Survey

Subject Line: IBM Survey – Free IBM logo Titleist Golf Balls

Here are the 7 guidelines for using e-mail marketing.

1. As our goal is always to build trust first, spamming can be a means to kill it. So if you are debating whether to use it or not, and you think you might offend someone, then don't use it.
2. Use e-mail marketing with your customer base – this is where you will have good impact.
3. Make sure you have offers that are in step with the relationship of the customer. Don't offer crap to great customers and don't assume you are best buds with a customer that you barely know.

4. Put the offer right up front because most e-mail can't be fully seen on the screen and if it is not visible then you have to assume it will never be seen.
5. As shown above, if you are a business partner with a trusted brand, then make sure you use that brand to leverage trust.
6. There are too many viruses out there to attach anything – a pdf is about the safest.
7. Make sure you give them a means to be taken off the list.

## e-Mail Marketing Guidelines



1. **As the building of Trust is our #1 goal, spamming is one of the fastest ways to kill trust.**
2. **e-Mail marketing works best with an established customer base (where trust is built up)**
3. **Segment your house file and have a specific offer that is meaningful to that segmented audience.**
4. **The first 3 lines are the most important – put relevant offer up front.**
5. **For prospect e-mail, use a trusted partner brand (like IBM) to build the trust and make the offer simple and credible: "IBM Portal Solutions Free Seminar -- Mystery gift to first 25 attendees."**
6. **No attachments. PDF is ok, but best to have whole message in one paragraph and respond back easily.**
7. **Give phone number and means to take off list**

If you are running an e-mail marketing campaign, then these 'must do's' from Marketo are right on.<sup>xviii</sup>

## 8 Tips for B2B Email Marketing Success Marketo

For a nurturing program to be effective, you need your email marketing skills to be top-notch. Some need a refresher, while others need basic information. To that end, here are 8 B2B tips:

- 1. Content is King
- 2. Consider Email Clients
- 3. Best Content to Use
- 4. Subject Lines and Titles
- 5. The Right Target
- 6. The Right Time
- 7. Start a Dialogue
- 8. Automate

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The 8 tips are simple:

1. Content is king. What that means is that if your message isn't relevant, then nothing else matters. Write about things they care about.
2. Make sure that your e-mail can be read on all the standard e-mail clients like Outlook, Google, etc. And make sure it is mobile. 64% of decision-makers now read e-mail on a mobile device so make sure that you don't have 'too much' where they can't read it.

3. Talk about things that pertain to their jobs and how customers are using their products; i.e., talk about them!
4. As mentioned above, put the offer in the subject line and use branding if you can, and make sure your subject line is 4 to 9 words max.
5. Make sure you are targeting the right person (with the right offer). By sending the right message to the right job title can increase open rate by 200%
6. There are automated services out there that can ‘look’ to see when people are on their e-mail and then send the e-mail only at that time which will increase open rates dramatically.
7. Begin a dialogue with things like surveys and feedback analysis and case studies, etc.
8. There are a ton of automated e-mail marketing programs out there that can do a better job of you to make sure the message is delivered correctly – especially if you are dealing with a large file. You would be wise to explore these.

E-mail marketer, Sean Platt, has done countless tests on e-mail and what works and what doesn't work regarding what to say to get people to 'open an e-mail'. Here is his article on that.

### *The 4 Words That Will Get Your Email Opened*

#### ***“You Are Not Alone”***

*In two and a half years of sending all kinds of emails to all kinds of lists, the simple phrase “You Are Not Alone” is the most-opened subject line I’ve ever seen — by far.*

*Because Aweber counts each email that’s been opened, even if they’re from the same user, that single subject line has had an average open rate of 90%, and has surpassed the 100% mark several times.*

*I’ve seen this subject line used successfully on emails ranging from [content marketing](#) to personal development to [potty training](#), with a dozen verticals in between.*

*The results are always the same.*

*I don’t want to be alone is a compelling, universally recognized statement.*

*The need to belong, to know that others are going through the same life experiences, is primal.*

*Sure, there are plenty of ways to appeal to our primitive human needs in an email subject line, but many can (and will) send your message directly to the spam folder.*

*Let me show you how to avoid that ...*

*Let your reader know someone is on their side*

*No matter what message you're sending or service you're selling, if you remind your reader that someone understands what they are going through and cares about helping them, you will become their temporary hero.*

*Do it repeatedly, and you will permanently solidify that position.*

*Use this subject line to get your email opened, but treat the open as just the first step. Once you [capture your reader's attention](#), prove that you deserved it by providing a useful solution to their most pressing problem.*

*Even the [most effective subject line in the world](#) merely gets you in the door. Your job is to address the issues.*

*Your subject line is an invitation to dinner; you still have to cook the main course.*

*Not only does the “You Are Not Alone” subject line get opened like crazy, it has an extremely high reply rate. This isn't too surprising since it responds directly to the need for community and connection.*

*Make sure you reply back. It's amazing how directly responding to the needs of your reader makes it A-B-C easy to nurture rewarding relationships.*

*Help people solve their problems and relieve them of their feelings of isolation, and they will reward you.*

*Figuring out what kind of reassurance your audience needs*

*The “You Are Not Alone” subject line works because it connects to an elemental human need — and the good news is, the well of human need is bottomless.*

*Respond to a single need or to more, but you must provide what people truly desire if you expect to reach the root of who they are.*

*Discover this and everything else becomes easy; growing your list, nurturing your relationships, and, ultimately, closing the deal.*

*You could read [Robert Cialdini's book Influence](#) for easily accessible insight into what makes us all tick, but believe it or not, it's easier than that.*

*To discover the core desires of your audience — think about what keeps you up at night.*

*What makes you worried, happy, sad, disgusted, afraid, surprised, or alone?*

*If you're a part of your market, what's true for you is likely true for them. Figure out what it is and you'll be jingling the keys to the kingdom.*

*Bonus tip — negativity sells*

*People will always work harder to keep something they have rather than try to gain something that they want — even if they desperately want it.*

*Negative headlines and copy alert your audience to a potentially serious problem — which you can then address and solve. By helping people keep something important to them, you've also gained trust.*

*Be helpful, solve a problem, take a worry and turn it into a smile. You'll get your email opened, make a friend, and nurture a relationship that will pay dividends for a long time to come.*

*Even better, you (and your business) will never be alone again.<sup>xix</sup>*

E-mail will be around for a while, but I tend to use it as a supportive sales and marketing tool verses the only means to an end. If you use e-mail marketing only, you will probably be perceived as 'cheap' by your prospects and I don't believe you want to go down that path.

### **Event Marketing and Web-seminars**

Event marketing is very expensive and very effective – but it is only effective if you do all the right things. Here are the right things to do.

The purpose of an event should be to pitch your story, meet the prospects to hear their needs and concerns, and to begin a relationship and get a follow-up appointment. Some people put a theme around an event, but I don't think you need to do that too much. Just make it relevant for them.

For B2B you either have to have the event in the morning or after work. You will not be successful in having it an event at noon or in the afternoon, and the reason why is because when people get to work, there are all kinds of fires they have to put out and so to get them away from work before the end of the day is very difficult.

And if you have it in the evening, then it better be fun; i.e., a sports event or a wine tasting or a brewery, etc.

The next thing is that the talk itself, unless it is a seminar where there is real knowledge passed, can only be 20 to 30 minutes long. That is all the audience will tolerate. Just like in the surveys, the purpose of the event is to do 4 things:

- 1 – Gain credibility with a solution that meets the client's needs
- 2 – Meet the person so that there is familiarity and to gain some trust

3 – Establish a relationship and find out their needs  
(BANT).

4 –Get an appointment with the qualified prospects.

In order to find out their BANT – have them complete a short 5 to 7 question survey (once again) and you do this so that you can then pull one from a hat for a great prize. As well, attempt to give everyone there something of value; a sleeve of golf balls, or a small box of chocolates works well.

Promoting the event is no different than anything else, except you don't start with the survey. You start with a nice direct mail invite, followed up by an e-mail and then a telephone call. Also, this is a good place to have your customers come and bring someone else along.

**Web-seminars** are very similar to event marketing except that you *can* do them in the afternoon. As far as promoting them goes, use a lot of direct mail postcards and a lot of e-mail and a lot of telemarketing.

The web seminar should only last about 40 minutes and it has to have the 5 Points of the Star of Trust:

1. Show your results and how it relates to them; use a case study
2. Show your competency by certifications and results

3. Give Insight into where the industry is going and where clients are ‘typically’ seeing a problem
4. Character – show some testimonials if possible
5. Relationships – if you don’t know anyone that is coming to the web seminar or if you can’t get referrals, then stick with industry related clients to help the customer bridge the relationship gap (if this is all done through an association, then all the more reason to demonstrate one of the member’s results with you.).

The web seminar needs to have a Q and A and make sure you have some Q’s and A’s already set up so that the question ball can get rolling.

Finally, conduct an on-line survey that, once again, BANT qualifies the attendees and give a ‘prize’ for responding to the survey.

There are some companies that have grown significantly by doing only web seminars through associations. It is a powerful tool that you should further explore.



## Chapter 10

# Timing

Timing can be totally immaterial and not mattering at all to the success of a campaign, or it can be more important than the creative or

vehicle (which accounts for up to 25% of the success of a campaign), and timing can even be more important than the offer (which accounts for up to 50% of the success of a



campaign), but timing is never more important than the list – which accounts for up to 75% of the success of a campaign.

Timing ‘floats’ in its importance. Sometimes it will be in your favor without you ever knowing about it and sometimes it is a killer and you knew nothing about it; the timing was either good or the timing was bad. You have heard it both ways.



But timing is more than just a passing element of luck. We can control a lot of actions in accord to timing. We can control the day of the week we call for an appointment or the time of day that we call. We can control when they get an offer and when it expires.

The most frequent question that are asked in terms of timing is how often one should reach out to a customer or prospect.

Hi-Q-group



## How Often?

Once we have found our 'contacts' – contact them every 4 to 6 weeks. e-Newsletters are great.



January	February	March
April	May	June
July	August	September
October	November	December

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There are windows of time. For your customer base, don't let more than 6 weeks go by without contacting them and it should really be every four weeks.

In Chapter 4House File Marketing talked about reaching out to your customer every month for communication on one of the five rules of the customer base:

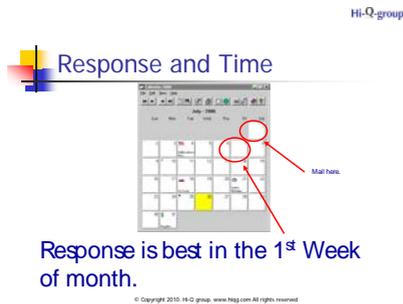
1. Survey them
2. Buy more
3. Buy more often
4. Keep them

## 5. Get referrals

For the prospect, the rules are a bit fuzzier; if you are delivering content that they need, and can lead to a sale, then you can talk to them every week. Only make a telemarketing call twice a month, however, and leave the e-mail and direct mail to more frequently. Use the ‘howdy hi’ stop by once a month if possible.

### **Events and Response for solicitation or survey.**

Offering events or asking people to respond in the first week of the month has been more successful than asking them to reply in any other week of the month.



### **How many days for the reply?**

For surveys, try and mail in the first part of the week and then ask for 7 to 10 days to respond, but a 5 day response may work even better.

Back in the early 1990's, we did all of the direct marketing for the educational programs for the Greater Cleveland Growth Association. One day on December 22<sup>nd</sup>, a frantic phone call came to us from one of the program managers, "Matt! I forgot. We have a program that is on January 6<sup>th</sup>! We have to get a mailing out!" We had to mail the day after Christmas and the recipients only had 3 days to respond; the week between Christmas and New Year's! We did the campaign and we got the highest response for that program that we got for any other program! Was it because it was just 3 days, was it the topic, was it time of year? Who knows, but having just 3 days to respond was not a hindrance.

### **When Do You Mail and When Do They Respond?**

Similar to above, when you do your surveys, when should you mail the survey and when should you ask for a reply?



partners and so I told him I would be back in two weeks. Two weeks later I show up and come into his office to see how things are going. I looked and saw the survey responses on the desk there and I said, ‘Hey how is the campaign going?’ He looks at me, then down at the survey responses and says, ‘Oh, great. We’re just about to start calling on them.’

I was so angry I could have spit in this guy’s eye! Two weeks and NOTHING. It was a total waste of time and money. Needless to say this guy is out of business now.

## Life Of A Lead

**1 hour  
is best!**

**However, calling within 5  
minutes is *21 times more likely*  
to result in a qualified prospect  
than if you wait half an hour.**



### **48 Hours MAX !!**

Dr. James Oldroyd from the Kellogg School of Management

A lead is only good for 48 hours maximum! One hour is best to reply to a lead. However, according to Dr. James Oldroyd of the Kellogg School of Management

(Northwestern University), if a person returns a call within five minutes of getting the response, then they are 21 times more likely to result in a qualified lead than if they wait even 30 minutes!<sup>xx</sup>

**Best Days For Prospect Calling:**

Did you know there are better days than others to make prospect calls to try and get appointments? Again, according to Dr. James Oldroyd some days are remarkably better than other days.



Dr. James Oldroyd from the Kellogg School of Management

*Here are the results of his great study.*<sup>xxi</sup>

The behavioral study revealed when sales representatives had success around calling web-generated leads. To find these facts, we looked at leads that were captured through a web form, and attempted or called at least one time. Summarized below are some of the more interesting findings related to speed and timing when responding to web-generated leads:

1. **Wednesdays** and **Thursdays** are the best days to **call** in order to contact (by **49.7%** over the worst day) and qualify (by **24.9%** over the worst day) leads. **Thursday** is the best day to contact a lead in order to qualify that lead (by **19.1%** better than the worst day).
2. **4 to 6pm** is the best time to call to make **contact** with a lead (by **114%** over the worst time block). **8-9am** and **4-5pm** are the best times to call to **qualify** a lead (by **164%** better 1-2pm, the worst time of the day). **4-5pm** is the best time to contact a lead to **qualify** over 11-12am by **109%**).

3. The odds of calling to contact a lead decrease by over **10 times** in the 1st hour. The odds of calling to **qualify** a lead decrease by over **6 times** in the 1st hour. After **20 hours** every additional dial your salespeople make actually hurts your ability to make contact to qualify a lead.
  4. 4. The odds of contacting a lead if called in **5 minutes** versus **30 minutes** drop **100 times**. The odds of qualifying a lead if called in **5 minutes** versus **30 minutes** drop **21 times**.

**Our first question was to see if there is a best day of the week to call to get the best contact and qualification ratios.**

1. **Wednesdays** and **Thursdays** are the best days to call to make **contact** with a lead. In fact, **Thursday is a 49.7% better day** to call than the worst day, Tuesday.



2. **Wednesdays** and **Thursdays** are also the best days to call to **qualify** leads. **Wednesday** was the top day and was **24.9% better** than the worst day, which was Friday.



3. **Thursday** is the best day to contact a lead in order to **qualify** that lead. It is **19.1% better** than Friday, which is the worst day.



## II. Time of Day:



Dr. James Oldroyd from the Kellogg School of Management

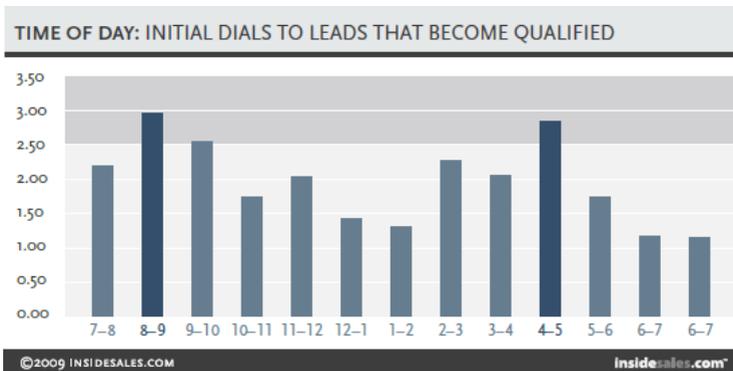
Our next question was to see if there is a better time of day to call to get optimal contact and qualification ratios. We used the same definition of terms for call (attempt), contact, and qualify.

Here is what we found:

1. **4 to 6pm** is the best time to call to make **contact** with a lead. It is **114% better** than calling at 11 to 12am, right before lunch. (We did not feel 7-8am was a standard work hour.)



2. **8-9am** and **4-5pm** are the best times to call to **qualify** a lead. 8-9am is **164% better** than calling at 1-2pm, right after lunch. That's a big difference! (After 6pm is not a standard work hour.)



3. **4-5 pm** is the best time to contact a lead to **qualify** that lead. 4-5pm is **109% better** than 11-12am. (We consider that 7-8am and after 6pm are not standard work hours.)



### •Response Time Analysis by Hours:

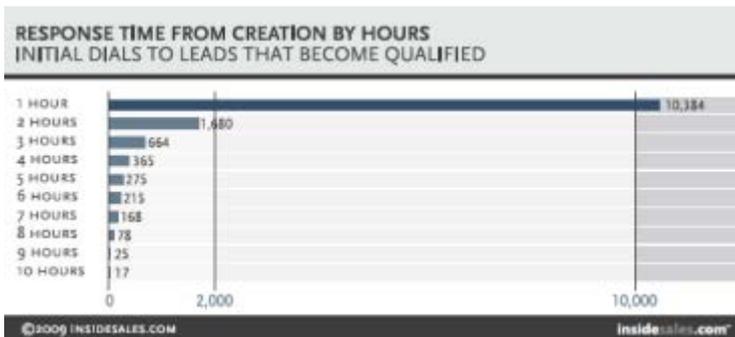
Day of week and time of day were found to be statistically significant variables in contacting and qualifying leads, but the significance of data we analyzed around response time dwarfed them both.

We started our analysis by measuring response times by hours and found an incredible drop in the odds of contacting and qualifying leads if you wait to begin calling for just 1 hour.

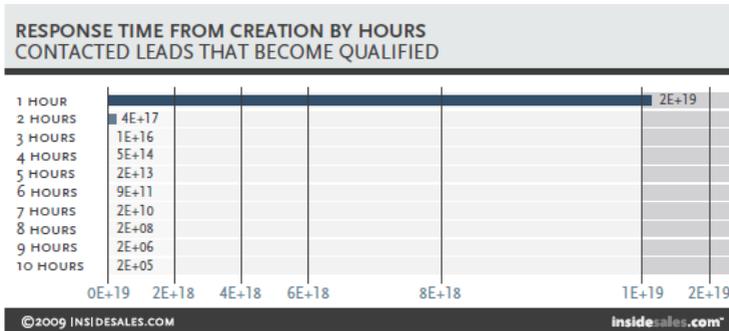
1. The odds of calling to **contact** a lead decrease by over **10 times** in the first hour.



2. The odds of calling to **qualify** a lead decreases by over **6 times** in the first hour.



After 20 hours every additional dial your salespeople make actually hurts your ability to make contact to **qualify** a lead.



Dr. Oldroyd’s study is vast and insightful. Just last week I was talking with one of my clients who I had trained on Dr. Oldroyd’s findings and he gave me these stats: “Matt, I just got done calling. I waited until this morning, Thursday, to make the calls. I called between 7 and 9 a.m. I called 11 people, and I got through to six of them and 3 called me back, so I got a hold of 9 out of 11 people! This works!”



Thanks Dr. Oldroyd!

### **Telemarketing and Why They Don’t Call Back.**

## 20 Calls a Day



Telemarketing is thrown around in this book like it is an apple that anyone can pick up anywhere. Telemarketing is in the part of the book on Timing because so much of telemarketing is based on timing. Telemarketing is extremely useful and powerful and it is purposely not covered in the book for one good reason: There is no way to give it justice. Period. If one Googles ‘Books on Telemarketing’ you would come up with over 6 million results! These books are written by experts who have done this all their lives. The one book to read is ‘Red Hot Cold Calling Techniques’ by Paul Goldner.<sup>xxii</sup> There are many great things in his book, but here is the overall principal. If you make the calls, then you will make money. If you don’t make the calls, then you won’t make the money. 20 calls per day for each of your sales people, if possible, is what to do each day.

The elements of a good telemarketing script are:

1. The list
2. The offer
3. The involvement technique

After all, telemarketing is ‘just the creative’ in the whole process. If you have a bad list and a bad offer, then no telemarketing techniques will get you by that. You still have to have the basics all in line.

However, why don’t people call you back when you do a prospect telemarketing call? Here are the reasons why:

### Why Don't They Call Back?



There are 7 Reasons why people don’t call you back.

1. You called the wrong person. Remember, everything begins with the right list. In order to minimize these odds, call 3 to 5 people in an organization
2. The offer is bad. The offer is the second most important item in determining the success of a

campaign. If you have the right person, but a lousy offer, they won't call back.

3. Wrong offer to the wrong person. You may have the right person, and you may have a good offer, but they may not match. An iTunes Gift Card to someone over 50 is an example of this.
4. The timing may be bad. Your offer and your contact may both be right, but the timing might just be bad. They may have just bought the very product or service you are selling; oh well!
5. They're gone! This may sound silly, but the person may be gone; either on maternity or sick leave, they may be traveling or they may be moved to a different department or they may have quit, etc., In any event, they're gone and they won't call you back.
6. Nepotism or Favoritism. Too many times it is an inside deal that you have no control over no matter what your offer and timing are.
7. You don't sound confident, credible, or enthusiastic. In other words, it's you – You suck! Yeah, there are just some bad telemarketers out there.



## Chapter 11

# Testing

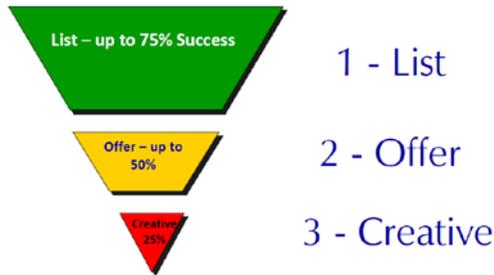
All good marketers love testing. Business owners, by rule, hate it. They are impatient and just want results. Testing is very important in ensuring a continual road of success.

No matter how long one has been doing direct marketing and testing, one will frequently guess wrong when testing one offer or one list or one creative verses another. But every time you test, your next campaign becomes less expensive and more profitable! The great survey responses discussed here came from first reading John Caples book, ‘Tested Advertising Methods’.<sup>xxiii</sup> He tested and his book showed that people respond for little booklets.

From there, offers of booklets were tested against other items. Books, clocks, trinkets, and about 100 items until we found out that golf balls and chocolates give the best response. As you have seen earlier, we have tested envelopes and styles of letters, and many other things. We even tested type fonts and found out that the Microsoft Font ZapfHunst is the best one for B2B – at this time. It may change a few years from now. This sentence is written in ZapfHunst font.

There is an order in testing. The order follows the logical order of that which is most significant in all sales and marketing: List, then Offer, then Creative.

## Test in order of Importance



## Gregor Mendel

Taking Genetics while at Ohio State ('The' Ohio State) taught me about white beans and black beans from the experiments of the Austrian monk, Gregor Mendel.

### Punnett Square

<b>Gametes</b>	<b>Y</b>	<b>y</b>
<b>Y</b>	<b>YY</b>	<b>Yy</b>
<b>y</b>	<b>Yy</b>	<b>yy</b>



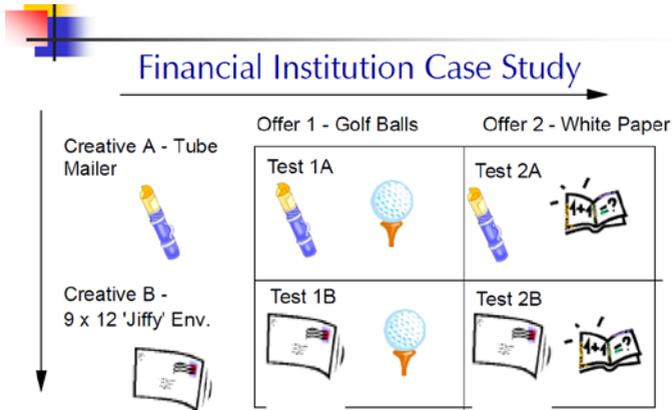
We use the same method when testing as it increased efficiency of testing by 100%. Here is how it works.

As stated before, you test in order of importance. For National City Bank, we had done all the database profiling and selected out the list, so we didn't need to test there. By this time, we knew that surveys were the way to go from about a dozen previous campaigns we had run and tested. But we didn't know if a booklet on the topic that we were mailing about would work better than a sleeve of golf balls for completing the survey.

As well, we didn't know which would get past the gatekeeper better; a mailing tube or a brown 'jiffy' envelope.

We set up a Gregor Mendol, Punnet Square, and this way we could test half the amount and get the same results.

Two offers were used, the booklet and the golf balls as the vertical tests, and the creatives, the tube vs. the jiffy envelope, was set up as the horizontal tests. It looked like this.



Each test cell had 2,500 mailers in it, which means we were testing 5,000 of each test. So four tests times 5,000 each would be 20,000 but by crossing the test cells, we were able to still get the same results while only mailing 10,000. By the way, we had an extra 250 names to mail and we were so sure that the tube mailer was going to pull the best response that we decided to put them all into test cell 1A. See below for the results.

	Golf Balls Offer 1 	White Paper Offer 2 
Creative A - Tube Mailer 	Test 1A Qty: 2,500 Outgoing cost / piece \$12.50 Total cost: \$31,250 Percent Response: 27% (675) CPA \$46.30	Test 2A Qty: 2,500 Outgoing cost / piece \$7.50 Total cost: \$18,750 Percent Response: 9.5% (237) CPA \$79.11
Creative B - 9 x 12 'Jiffy' Env. 	Test 1B Qty: 2,500 Outgoing cost / piece \$10.50 Total cost: \$26,250 Percent Response: 50% (1,225) CPA \$21.43	Test 2B Qty: 2,500 Outgoing cost / piece \$6.50 Total cost: \$16,250 Percent Response: 10% (250) CPA \$65.00

Test cell 1B was the winner and it pulled a HUGE 50% response! We were wrong on which test cell we thought would pull the best response; and that is why we test.

There are several interesting things to pull from this test and the 50% response rate is the first one to see, but take a look at the CPA- Cost Per Acquisition.

Test cell 2A's outgoing cost per piece was \$7.50. If we had gone to the CFO and said, 'Well, we are going to test two things here to see which pulls better. One test is \$7.50 per piece and the other is \$10.50 or \$12.50 per piece, what do you think we should do?' The answer would have been quick.

Fortunately the Vice President was courageous enough to go for the test on our recommendation and even though test cell 2A was only \$7.50 per piece outgoing versus \$10.50 for

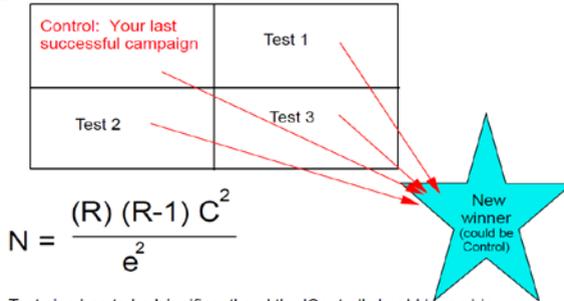
the Jiffy envelope test cell with the golf balls, cell 1B, the CPA for test cell 2A was \$79.11 and the CPA for test cell 1B was \$21.43! So it was nearly four times cheaper to get these leads than it was the ‘less expensive’ test cell. So which cell was the most expensive one? It was the one that cost almost the most!

And this is why we test. Now, if we had just tested the booklet against the two envelopes, then we would have gotten a 10% response and most people would have been thrilled with that. But by testing, we increased response by 500% and decreased costs by 400%! And THAT is the power of testing.

### **The Control.**

So now you have a winner and what do you do with it? You keep trying to beat it is what you do. For National City, they decided that CPA (Cost Per Acquisition) was the most important issue and so we kept testing until the CPA got down to about \$18.00. The response dropped a bit, but that was not their main concern

## Test Against The Control



$$N = \frac{(R) (R-1) C^2}{e^2}$$

Test size has to be 'significant' and the 'Control' should be as big as possible, and the tests cells as small as possible. The Bechoffer model is best for polynomial test cells.

### How Many to Test: Statistical Significance.

This is important because if you test too few then you have learned nothing. You may have hit either the pocket where everyone responds and so you think you are wildly successful when you are just lucky, or you may hit the pocket where no one is and so you think you have failed when you haven't. So you have to test enough. Now there are three ways to do this.

- 1- Use statistical analysis and get it right. This is what I have done for years.
- 2- As the great direct marketing guru Ed Burnett says, 'If you get 50 responses, then you have a significant test.' I like that.

- 3- Mail 1,250 per cell if you have a Punnet Square, or 2,500 per individual test, and you will be ok. I like this one, too.

However, by doing the right statistical tests, and because we got such a high response rate (20% or more sometimes), we are able to mail as few as 175 and still be valid! For multiple variable tests, use the Bechoffer Statistical Model for multiple variables – shown on the next page. You can easily go on-line to access ‘statistically valid test cell size’ and you can spend hours doing it – it’s fun, but in the end, your results will be very similar to what I have here.

Table  $\lambda = \sqrt{n} / \sigma$  for determining sample size to find 'best' of Y population means.  
 From R.E. Bechofer "A single-Sample Multiple Decision Procedure for Ranking Means of Normal Population with Known Variances" (1954)

Number of Pop	.90	.95	.99
2	1.1824	2.3262	3.290
3	2.2302	2.7101	3.6173
4	2.4516	2.9162	3.7970
5	2.5997	3.0552	3.9196
6	2.7100	3.1591	4.0121
7	2.7972	3.2417	4.0861
8	2.8691	3.3099	4.1475
9	2.9301	3.3679	4.1999
10	2.9829	3.4182	4.2456

The Bechofer table allows a decision maker to determine the necessary sample size for the following situation: The decision maker wishes to determine, to a certain confidence level, that the test offer with the best result is indeed the true best offer. The decision maker needs:

- (1-a) the confidence level
- s the std dev
- t the tolerance, i.e., the smallest difference between the best and second best result to be recognized, and r number of offers

It is assumed: (1) the s is the same for all test offers, (2) equal sample sizes are employed for all test samples, and (3) the tests are conducted at the same time.

So if there are 2 tests,  $r = 2$   
 and if the desired tolerance is 10 percent, then  $t = .10$   
 and if one wants 95 percent confidence, then  $a = .05$   
 and s is calculated as the square root of  $p * (1-p)$  which, if traditional response is 50 percent, then  $s =$  the square root of  $.5 * .5$  which =  $.5$

The Bechofer table gives a value of 2.32 for the above, so the appropriate sample size, n, for the two groups is ...

$$n = B \text{ squared} * s / t \text{ squared or}$$

$$n = (2.32)(2.32) * .5 / .0025 = 1076$$

If you wanted to be 90 percent sure there was a 5 percent difference between the tests, then

$$n = (1.81)(1.81) * .5 / .0025 = 720$$

## Case Study – Who Won?



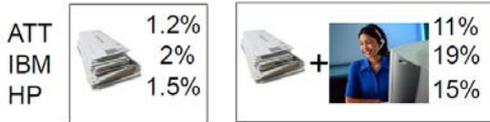
### Tested same Prospect list and same Offer (golf balls):

Another test, which is irrelevant now due to how many years ago it was, tested the same list and the same offer of free golf balls if they filled out a survey, but we tested e-mail, vs. telemarketing, vs. direct mail, and direct mail won. What this test didn't show was the quality of the telemarketing vs. the direct mail. It is suspected that the telemarketing 'may' have been better. (The e-mail responses were under 1% and most said, 'take me off your damn spam list!')

Another test was to test the effectiveness of multiple touches. This test, too, is an old test, and I don't think there was e-mail when this test was conducted. But the demonstration here is the testing of multiple touches.

In this test, ATT, IBM and HP all did a mailing and got between a 1% to 2% response rate. They then did the same mailing but followed up with telemarketing and there was a 10 fold increase in response! Thus, always use a multi-touch campaign when you are trying to get leads or sales.

### Multiple Touch Produces Best Results



Does this really work?

### Does It Work?

"In working with the [redacted] campaigns in August [redacted] and in January [redacted] there was a significant difference in the percentage of appointments we were able to generate for the tool that the [redacted] follows through with. In the August campaign, we did a mailing to approximately 917 CFOs and others which was a self mailer followed by our 3 call attempts to generate appointments. From that we secured 16 appointments.

In January, we tested the use of the Lapis CPM survey mailer (with a promise of golf balls for completion of the survey) to 610 CFOs (where almost 1/3 were considered poor data; i.e. out of business, no working number, left the company, etc; thus the real amount called to was closer to 427) and followed with our 3 pass calling and secured 21 appointments. In reviewing the two programs, it was much easier and more efficient to use the Lapis CPM mailer first before we called, and I highly recommend that methodology in the future."

Rachel S. Matenaer  
Advisory Call Center Manager

120% Better  
Appointments!

This testimonial is difficult to read, but in essence it says, ‘Yes, this works!’

### **Appointments – Soft or Hard Test:**

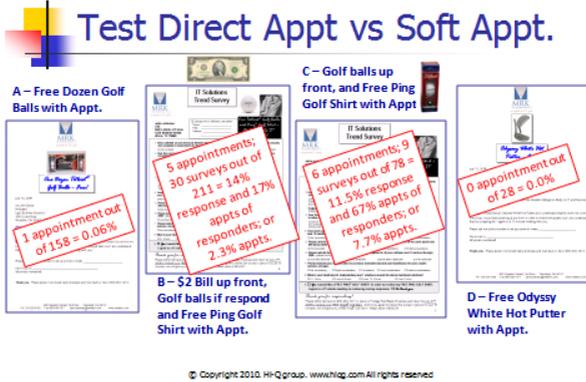
This shows a program where we tested 4 different ways to get appointment and get response.

**Test 1** – We sent a letter with a phone number and a reply card where if they agreed to a 20 minute appointment, we would bring along a dozen golf balls – 1 appointment was gotten.

**Test 2** – We sent a \$2 Bill in an envelope and asked them to complete a survey for a sleeve of golf balls – 30 surveys or 14% response on that – and then offered them a free golf shirt if they agreed to an appointment too – we got 5 appointments for 2.3% appts.

Hi-Q-group

4 tests:



**Test 3** – We sent golf balls up front and offered a golf shirt with appointment, and we got 9 surveys for 11.5% response, but 6 of those agreed to an appointment for 7.7% overall!

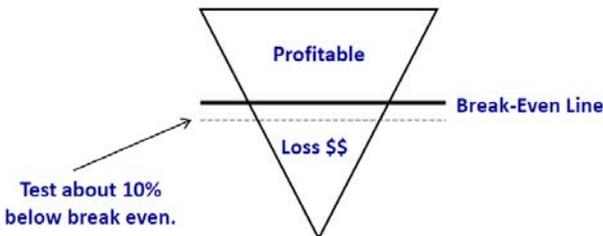
**Test 4** – We offered a Free Odyssey putter for an appointment and got 0.

Thus the soft approach of ‘fill out the survey and give us your opinion first’ worked much better than the mercenary approach of ‘buying an appointment.’

### How ‘Deep’ To Test:

When testing, it is very important to ‘test deep enough’. What that means is simply this; if you test only to make a profit at each test, then you will never know the heights of profits you may achieve – at least it will take you a lot longer and be a lot more expensive. You want to test just below the Break Even Line (BEL).

## Test Past Break-Even



To give an example, let’s say you are doing a ppc campaign and you want to test into 5 different sites you believe will be profitable, and when you put your ad there, sure enough, they work! Your ROI is 4:1! Good for you.

Now what you need to do is ‘go deeper’. You need to go to sites that are not as related to you. What if you are STILL

profitable?! Now you are, say 1.5:1. Push deeper yet! You may end up at 0.9:1 – and now you stop!

Remember that it is 5 to 50 times easier to resell to an existing customer than to get a new customer; therefore, you want to go and go until you just start losing money on acquiring customers because if you follow the five rules of customer sales then you will more than make up for it down the road.

If you don't go this deep in the testing (just below break-even), then you would have lost out in all the up-side profit from these new customers over the many years (the lifetime value).



## Chapter 12

# Follow-Through

Now we have come full circle. In the beginning it was mentioned that the List is the most important thing and that the Follow-through is equally as important. Quite honestly, if you have a phenomenal sales person, then all you need is the chapter on Lists and this chapter on follow-through because if you do those two things well, then you won't need much of all the stuff in the middle.

The follow-through determines the end game of your campaign. You saw the importance of follow-through in Dr. Oldroyd's information. It is critical. It is either on or it is off. There is not much in between.

If you follow the methods presented here, you may end up with more leads than you can handle. So, as Stephen Covey says in his 7 Habits of Highly Effective People, ‘begin with the end in mind. Before you begin you campaign, plan for dozens of leads in the first couple of days and have a plan to follow up on them as quickly as possible. You don’t want to lose business because you had too many leads to follow up with.

To whom it may concern,

Since we hired Matt three months ago, he has helped us to massively increase our lead volume. Matt warned us and now our biggest problem is how to handle all of our leads! In fact our leads are up 288% from when we began with Matt!

Thanks Matt!

Jonathan Slain

Owner of 5 Fitness Together locations throughout Cleveland

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The slide below shows a whole bunch of sales stats of questionable origin, but the numbers they represent are true in spirit if not in fact.

## Sales Statistics

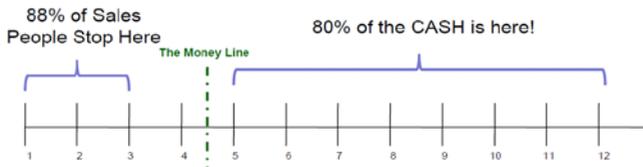
- 48% of sales people never follow up with a prospect
- 25% of sales people make a second contact and stop
- 12% of sales people only make three contacts and stop
- Only 10% of sales people make more than three contacts
- 2% of sales are made on the first contact
- 3% of sales are made on the second contact
- 5% of sales are made on the third contact
- 10% of sales are made on the fourth contact
- 80% of sales are made on the fifth to twelfth contact

The stats show two amazing numbers.

1 – 88% of sales people stop after 3 contacts

2 – 80% of sales are made on the 5<sup>th</sup> to 12<sup>th</sup> contact.

### The Cash ‘Touch’ Line



This is eye-popping information.

The Money Line is the line where money starts to flow; yet, as you can see, most sales people stop before then.

The truth about sales and follow through comes down to this say: ‘You are as wealthy as you choose to be.’ The ones who are wealthy are the ones who are choosing to continue to follow-through, while all the others are just hoping. There is a sales book out called, ‘Hope is not a strategy’ by Rick

Page.<sup>xxiv</sup> Making calls is a strategy for success. If you follow-through, you win.

In Chapter 7 we talked about getting to the C level and about the DISC profile. In regards to follow-through, there are four different kinds of personality types: The Hunter, The Farmer, The Cook, and the Skinner.

The Hunter is impatient and typically loses patience after three calls or so and so cannot nurture a sale along to its proper end.

The Farmer is too patient, and although she can move the prospect along very nicely, she oftentimes feel guilty about closing them. They would rather be their friend.

The Cook is the operations person who is better to be heard but not seen. The person REALLY knows a lot of technical operations stuff to make whatever you're selling work, but they usually look and talk pretty rough. If you get them talking to a customer, then at some time, the customer will be offended – it's just the way they are.

The Skinner is the mercenary. This person will work the existing customer to get more meat off their bones and then make a great soup from the leftover bones.

So who are you? You can't and you shouldn't be all the above.

## What Are You?



Farmer



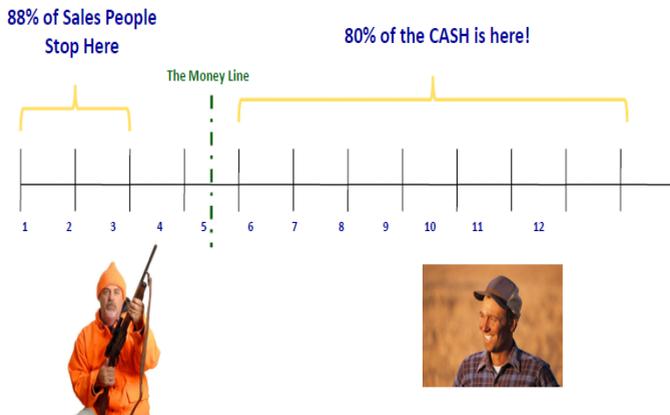
Hunter



Cook

Understanding first that the customer needs 5 to 12 touches before they become a customer is good info, and then understanding that you need a farmer, a hunter and a cook are other good pieces of info in getting new business. Marrying the two pieces of info together makes a working sales model look like this.

Most company's sales model looks like just the opposite, however:



Most companies put the hunters to the left and the farmers (inside sales) to the right. The hunter should only be brought in once the farmer has planted the seeds, watered the ground, added fertilizer, and grown the corn so tall that the deer are now coming to eat in droves – that’s when to call the hunter and BAM!! Dinner is on the table (with a nice side dish of corn, too).

There are many good farmer / nurturing programs out there that run under the name ‘Marketing Automation’, and I don’t want to mention any at the fear of missing out on some good ones. A Google search under ‘Marketing Automation Programs’ comes up with over 19 Million hits! Typing in just ‘marketing automation’ in the Google Search garnered 28.6 Million hits! Some are very inexpensive and some are very expensive. There is a right one out there for you, but the point is that you would be best to automate a portion of your farming activities as well as to customize a portion, too.

Here is how a Wikipedia author defined it:<sup>xxv</sup>

‘The name given to software platforms designed for marketing departments and organizations to automate repetitive tasks is Marketing Automation. Marketing departments, consultants and part-time marketing

employees benefit by specifying criteria and outcomes for tasks and processes which are then interpreted, stored and executed by software, which increases efficiency and reduces human error. It was originally called email marketing automation.

The use of a marketing automation platform is to streamline sales and marketing organizations by replacing high-touch, repetitive manual processes with automated solutions.’

Below is a good cartoon of a persistent, and probably, ‘successful’ sales guy. He was not part of the ‘hope sales strategy’ crowd.



Few sales people do a good job with follow-through which is why Marketing Automation is a necessary tool. However, the bottom line is that Marketing Automation is really for lazy sales teams. Too many sales people want ‘hot’ leads where all they do is close and where they don’t have to work. Life isn’t like that.

A great sales person WORKS every lead they get. Now, the great sales teams work in tandem to make sure that the

‘gaps’ are covered. The farmer has ‘closing gaps’ and the hunter has ‘nurturing gaps’ – together, they are a good team.

In chapter 2 the five elements of successful sales and marketing (list, offer, creative, timing, and follow-through), and later we discussed a business in Columbus that didn’t follow through with their leads and they are now out of business. Here is the opposite story. This is a company who followed through and who is thriving today:



## Case Study

### IT Software Campaign Result (2008 Lapis CPM)

List: Warm leads, reps called and validated trade show attendees – 398 final qty mailed.

\$5,200 Campaign Cost

20% response rate – CPA = \$64.87

Reps spent 5 days immediately calling 80 respondents

\$500K to \$600K in pipeline in 1 week

Final Sales: \$536K over 60 days!

ROI: \$103 : \$1

If you look at this campaign, this came from the survey mailing where the ‘warm leads’ were followed up right away and the reps spent 5 days working the 80 respondents and it turned into almost a half million dollars of business in 60 days! This sure beats leads sitting on a desk!

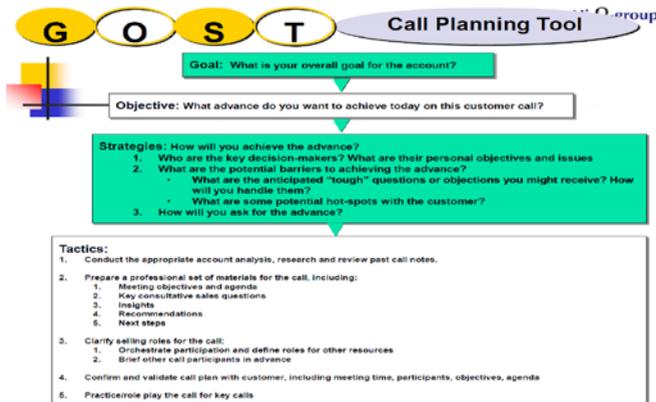
## Pre-Call Planning.

# Pre-Call Planning

In a recent and renowned sales effectiveness study, it was found that High Performance sales people put an emphasis on pre-sales call planning and preparation. Studies show that sales reps who do 'pre-call planning' are 300%+ more productive than those who don't.

Who needs a study? If you don't go prepared for ANYTHING, then how effective do you think you will be?

There are a bunch of pre-call planning forms out there, but at IBM we used a simple one called GOST



The G stands for the Goal – what is the goal for this account, or even for this sales call?

The O stands for the Objective of the account or the sales call.

The S stands for the Strategies you will use to get to the objective.

Finally, the T stands for the down and dirty, on the street, tactics (like mailing, calling, stopping by, Marketing Automation, etc.) to fulfill the strategies so that you can reach your objectives and achieve your goals.

As we say at Hi-Q, if we just do GO, then we will be successful!



## Chapter 13

### Putting it all together

Hopefully, you have done some lead gen campaigns and gotten some leads already before you got to this part of the book; i.e., like mailing the ‘Golden Letter / Survey’.

Integrated marketing works.

If all you did was direct mail and telemarketing, you would be successful. The below campaign shows this. We mailed 496 and followed up with telemarketing and we got 44 appointments and 8 deals for our client! From this simple demonstration of integrating just two elements, direct mail and calling, we were HUGELY successful.

## Sales & Marketing Integration

- Pre Mail Call
- Mail Call
- Post Mail Call
- Appointment



***496 Mailed: 44 appointments and 8 deals on the table!***

### Centrifugal Force Marketing (CFM)

Below is something we put together called ‘Centrifugal Force Marketing’ and what CFM does is combine many, many elements of sales and marketing and PR to get your message ‘spinning’ so fast that leads and business can’t help but spin out to you.

The more activities you do, the faster the spin and the more opportunities will appear.

- a) Direct mail
- b) E-newsletters
- c) Sales Calls – Howdy Hi Calls!
- d) Social Media / Blogs
- e) Speaking engagements
- f) Mobile marketing (QR Codes)

- g) Boards
- h) Pro-Bono Work for larger Charitable organizations
- i) Published Articles (Books)
- j) White papers
- k) Space Ads
- l) Referrals
- m) Radio interviews
- n) Search Engine Marketing
- o) Search Engine Optimization
- p) PPC / Adwords
- q) Press Releases
- r) Video marketing (with other)
- s) Trade Association alliances
- (1) Marketing off of this included many of the other activities here
- t) Trade Shows
- u) Webinars
- v) Print newsletters
- w) 3<sup>rd</sup> party endorsements
- x) Teaching
- y) Networking
- z) Customer Surveys

Integrated marketing assures you are reaching everyone. Here is the deal: Everyone buys differently. Back in the early 1980's when TV Catalogs and TV Shopping came out, people were screaming – 'This is the death of the retail store'. Then when the internet came out people were screaming, 'This is the death of the retail store and of the mail order catalog.' And they never went away. And now with Social Media and Mobile Marketing people are screaming again that some other form of buying will go away – IT WON'T.

People are all different and they are different on different days. What that means is one day Sarah wakes up really energized and alive and she wants to see the world and so she goes out to the retail stores and malls and downtown boutique shops just for the experience of being around the energy. The next day she is all tired, but still has some shopping to do and she doesn't want to see anyone, and so she goes on-line and finishes up her shopping.

Every week this scenario will play out in 100 different ways. All these new means of marketing do is give new means for people to shop – it doesn't replace too many of them.

The more people see your name and read your articles and see you speak and read your blogs, and ...the more trust you will build up.

## **Let's Get Practical: What To Do When To Get Leads NOW!**

Below are 13 things to do NOW to grow your business, but let's get even more practical and say, 'Let's do 6 things'. What are the top 6 things to do to grow your business, and here they are:

1. Follow the 5 rules of Customer Sales (Chapter 4); this will increase your business AT LEAST 20%.
2. Profile your list, and find the top 100 companies with 5 contacts per company to go after.
3. Mail them all a survey with a \$2 Bill and a Sleeve of golf balls as a reward
4. Make 20 calls a day – some pre calls, some during the mailing, and some post
5. Learn how to talk tactics and strategy combined – and be the expert at what it is you are selling.
6. Secret Weapon. Stop by randomly to everyone on your target list. This is called the 'Howdy Hi' call. People will buy from you once they meet you – so go and meet them. Make sure you take cookies for both receptionists, and make sure you take golf balls or chocolate for your target person. Be willing to just sit in the lobby.

These six points will get you going quickly. Yes, you need a better web-site, and yes, you need some social media, and yes you need some PPC and SEM (SEO); yes, you need all these things, but this book is written with the small (micro-small) business owner in mind; under \$20Million in revenue (and especially for the guy with < \$5Million)who sometimes can't do all those things. So by doing just these five (and if you have been around a while, just by doing the Customer Marketing Program, you WILL grow by at least 20%.

Below are the 13 things to do if you want to conquer the world, and these include the six top ones for B2B growth. If you find that you can do them all, then you are going to be flying in new leads and sales!!

## So What Do We Do?

1. House File Market IMMEDIATELY (4 Rules; Client Analysis Form)
2. Database Profile for Sweet Spot (Industry, Size, etc.)
3. Create Messaging around Industry and Results / Competency / Character
4. Pick Just 20 – 50 Prospects Per Rep – And make 20 calls per day
5. Find 3 to 10 people to contact per company – go deep!
6. Have website be (mobile) ready – develop EcoSites off of it.
7. Do some PPC and mobile marketing
8. Have Testimonials to gain trust
9. Talk to each person in the buying process according to the stage and need / pain
10. Be The Expert and Trusted Advisor – have white papers, studies, etc.
11. Reduce Risk, Increase Agility, Compete on Process and not Product
12. Communicate Frequently – newsletters, white papers, etc. (Content is king)
13. Decrease the numerator and increase the denominator

Now, if you have trouble executing on any of this or need more help with anything, please feel free to call me.

440-724-6363 or e-mail me at [mmm@HIQG.com](mailto:mmm@HIQG.com) and I will be glad to help you out.

Matt Minarik

Hi-Q group

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Fairview Park, OH 44126

## Endnotes.

- 
- <sup>i</sup> Million Dollar Consulting. Alan Weiss. McGraw Hill 4<sup>th</sup> Edition © 2009 pg. 364.
- <sup>ii</sup> <http://www.sempo.org/>
- <sup>iii</sup> <http://www.google.com/about/corporate/company/tech.html>
- <sup>iv</sup> <http://connectingdots.typepad.com/thewebchef/2009/07/forrester-projects-growth-of-interactive-marketing.html>
- <sup>v</sup> [http://hosteddocs.ittoolbox.com/toolbox\\_-com\\_top5-trends-in-b2bsocialmediausage.pdf](http://hosteddocs.ittoolbox.com/toolbox_-com_top5-trends-in-b2bsocialmediausage.pdf)
- <sup>vi</sup> <http://emergingtech.ittoolbox.com/research/top-5-trends-in-b2b-social-media-usage-what-every-marketer-should-know-22066?success=yes>
- <sup>vii</sup> <http://www.splashmediau.com/blog/creating-social-media-marketing-plan>
- <sup>viii</sup> <http://www.mailermailer.com/resources/metrics/2011/open-rates.rwp>
- <sup>ix</sup> <http://abcnews.go.com/blogs/business/2011/11/tech-company-implements-employee-zero-email-policy/>
- <sup>x</sup> <http://www.searchpointmarketing.com/mobile-marketing/>
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**Matthew Mann Minarik:** Mr. Minarik is president of Hi-Q group, a Business Growth Consulting firm, and has 24 years of experience in market research, sales, consulting, direct marketing, business planning, and business development for corporations of all sizes. Mr. Minarik began running his own business early in his business career and ran a successful marketing agency before the age of 30. He has been the vice president of sales and marketing for a start-up internet and telecommunications company that grew to \$1.5M in its first year. Mr. Minarik created a marketing program that National City Bank used for over 10 years and which generated over \$3Billion in commercial revenue. Mr. Minarik created research methodology that was adapted by IBM. Additionally, Mr. Minarik was brought into IBM as a professional hire to function as the Central Region's Territory Marketing Manager while he maintained his consulting practice. At IBM, Matt was responsible for the marketing of a \$Billion sales quota for over 100 sales representatives in 13 states and 29 territories, and two national call centers. Mr. Minarik was IBM's #1 Marketer and Lead Generator for their Software Group in both 2001 and 2002 where he generated over \$700 Million in pipeline opportunity for his region in just one year. IBM sent Mr. Minarik on a twenty-one city international speaking tour to present on the topic, "How To Generate Leads" for IBM's business partners. Mr. Minarik is an international speaker and seminar instructor around topics of: Strategic Planning, Customer Revenue Programs, Sales Education, C-level Communication, Marketing, Human Resources / Staffing, and Growth Strategies.

Hi-Q group, Inc. is a B-2-B Business Growth Consulting firm focusing on Lead Generation, Customer Sales, Positioning / Messaging, Market Research, C-level Sales Education, Follow-through, and Improving the Sales Process. Currently, Mr. Minarik is engaged with international and domestic corporations like Forsythe, B.O.S.S. and Free Borders for the purpose of market research, sales growth strategies and processes, sales training, messaging, lead generation, and growth strategies.

Mr. Minarik attended John Carroll University on the President's Scholarship and then transferred to The Ohio State University where he received a Bachelor of Science degree in biochemistry in 1982 including one year graduate studies, and went on to receive a Physician Assistant degree at CCC Cleveland and Case Medical School in 1986 where he received specialty training in neurosurgery and held a national proficiency certificate in surgery before leaving that field to focus on business development, sales and marketing. Mr. Minarik is a frequent guest lecturer for the MBA program at John Carroll University and at Hiram College and has been an Adult Education Educator at Cleveland State University and is one of the premier presenters for The Greater Cleveland Growth Association on the topic of positioning, and lead generation. Matt is just completing his book, "How to Generate Leads and Grow Your Business – Now!" and the book is available on Amazon by e-book as of October of 2011. Matt is an avid outdoorsman and has been an athlete competing in cycling, baseball, rugby, coaching, refereeing, and mountain climbing. Matt climbed Mt. Marcy and Mt. Adams in January and has winter camped in the Boundary Waters Canoe Area in the winter where temperatures reached minus 45 degrees F°. Mr. Minarik has served on several Boards, and most recently was on the Board for 'Maggie's Place' – a home for pregnant homeless women. Mr. Minarik and his wife, Margaret, have six children and are co-authors of a published book, 'The Natural Life' (Tate Publishing; 2011).

**GUARANTEED TO WORK:** *“If you don’t double your leads or grow your business by at least 20% by using the methodology taught in this book, then send me a letter, or e-mail me, and I will send you back your money – and you can still keep the book.”* Matt Minarik

Matthew:

I hope this finds you well. The New Year is starting off great. I have taken almost all of your information from the presentation in Pittsburgh and put it to use and you know what it WORKS. Thank you.

Respectfully

Joseph P. Harford  
VP Sales & Marketing  
Reclamere

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