

## Praise for *Seal the Deal*

“*Seal the Deal* is an excellent source for anyone in business. Suzi’s powerful insights and practical tools will enable business people in organizations of all sizes. Whether you are inside a large organization and want to increase your visibility, a retiring executive about to launch your own consulting effort, or a sales executive wanting to unlock your best performance, you will find valuable ideas, tools, and methods in this book. For those newer to solopreneurship, Pomerantz’ book is an integrated system that functions as a personal sales coach throughout a 10-week course. I’m hooked! I kept intending to just skim but I couldn’t seem to skip any of it. Of the 14 books ‘in progress’ on my reading table, none has captured my attention like *Seal the Deal*! This is a ‘must have’ for anyone who wants to increase the effectiveness of his or her networking, marketing, and sales efforts.”

—Angela Wagner, CPCC, executive coach and  
top-performing executive, Accenture.

“This book is structured brilliantly—you have a chance to ‘eavesdrop’ on an actual telecourse, on the *Seal the Deal* approach, where actual participants voice their questions, anxieties, and insights. It puts the reader right in the learning experience. *Seal the Deal* is very readable with a professional yet conversational tone. And you’re never in doubt that Suzi knows what she’s talking about!”

—Mary Beth O’Neill, author of *Executive Coaching with  
Backbone and Heart*

“I’ve experienced the system personally and can say that the ‘Seal The Deal Formula’ belongs in any professional’s chemistry kit.”

—Mike Jay, CEO of B-Coach Systems and  
author of *CPR for the Soul*

“With *Seal the Deal*, Suzi Pomerantz masterfully guides new and experienced professionals alike to grow their business to the next level. Suzi reminds us that selling is not about being inauthentic, it’s about clear, honest communication and cultivating win-win relationships.”

—Karlín Sloan, author of *Smarter, Faster, Better: Strategies for  
Effective, Enduring, and Fulfilled Leadership*

“*Seal the Deal* is packed with worksheets, templates, personal action plans and homework action steps—just what anyone who sells services or ideas needs to build or transform a successful business.”

—Agnes Mura, MA, MCC, founder of PCMA and author  
of *Ten Themes and Variations for Postmodern Leaders and  
Their Coaches*

“Have you ever wanted to ‘eavesdrop’ on a highly successful coach who is sharing words of wisdom? Well, in *Seal the Deal*, you get to do just that when you follow the conversations between Suzi Pomerantz and several of her coaching colleagues. I’ve known Suzi for many years and she has never failed to amaze me with her intelligence and skills as a coach. This time she graciously shares her knowledge, experience and best practices as she helps professional services providers to sidestep the pitfalls and mistakes most beginners (and even seasoned practitioners) make in networking, marketing and selling their services. There’s a wealth of information with strategies, tips, tools, powerful questions, checklists, and even a 10 step plan to follow. It’s all just waiting for you to implement. Am I a Raving Fan of Suzi and *Seal the Deal*? Absolutely!”

—Syl Leduc, M.Ed., MPEC, Certified Executive  
Coach and Leadership Development Strategist,  
[www.TurningPointLeaders.com](http://www.TurningPointLeaders.com)

“If there ever were an Oscar given for ‘Super Coach,’ Suzi Pomerantz would be my nominee. Her book, *Seal the Deal*, is a masterful production and destined to become a classic for any executive or personal coach. Not only is the networking, marketing and sales content of the book superb, but also watching her coaching technique throughout the book adds incredible value to any coach practitioner. Two thumbs up on this one.”

—Steve Gladis, Ph.D., former professor and associate  
dean/director at the University of Virginia, author  
of 11 books including *Survival Writing for Business* and  
*The Manager’s Pocket Guide to Public Presentations*

“Over the years I’ve discovered that you can have the best products and services in the world, but if you don’t have a plan and tools for building your business with your key clients and referral systems, you will remain an unknown commodity. *Seal the Deal* demystifies networking, marketing, and sales—and most of all will boost your confidence to go after the clients you really want to work with. *Seal the Deal* is destined to be a classic—it’s what everyone needs to build a successful business.”

—Judith E. Glaser, CEO Benchmark Communications, Inc.  
and author of two best selling business books—*Creating We*  
and *The DNA of Leadership*

“In reading Suzi Pomerantz’ book I feel like I am participating in a Master Mind group or in one of her teleclasses—and I’m the center of attention. Everything that Suzi has to say about networking, marketing, and sales relates directly to me and my life as a coach and consultant. I also learned quite a bit about how to get out of my own way—I wish I had her book 40 years ago when I first began consulting and coaching!”

—William H. Bergquist, Ph.D., president of the Professional  
School of Psychology and author of 42 books, including  
*Executive Coaching: An Appreciative Approach*

“Entrepreneurs looking for a way to differentiate themselves in an overcrowded marketplace have a new handbook, and it’s needed by the many service professionals who soon realize that substantial industry expertise and impressive talent are simply not enough. In *Seal the Deal*, Suzi Pomerantz takes talented entrepreneurs behind the business-building curtain and gives them a six-figure formula for success. By teaching the reader how to use marketing, sales, and networking in strategic concert, and how to weave individual success strategies into a comprehensive, proven success formula, *Seal the Deal* empowers entrepreneurs with a logical and manageable system for substantial growth.”

—Jennifer Kalita, entrepreneurial consultant to the  
National Association of Baby Boomer Women and  
author of *In Business & In Balance™*

“I started my consulting/coaching company three years ago, after 20 years of quota-breaking sales and management for Fortune 100 companies like GE and McGraw-Hill. I have been in almost any sales situation that is possible and find myself awed by *Seal the Deal*. This book offers incredible real-life situations and the solutions we all need when we are selling our own services. Professionals of all kinds will greatly benefit by reading this book and applying the selling solutions. *Seal the Deal* will greatly increase your revenue through improved confidence. After reading it, I signed my first six-figure client!”

—Nancy McCarthy, president of DC Rainmakers

“If you are a professional services provider, here is an offer you can’t refuse. In her ten-step model for growing your business, Suzi Pomerantz shows you how to network, market and sell as a natural act—a game that you can play and win and have fun while you’re doing it. Reading this book is like having Suzi as your personal sales coach, while you follow her roadmap and dramatically expand your business in a systematic and sustainable way. *Seal the Deal* is the real deal!

—Don Arnoudse, executive coach and  
founder of The 2nd Half

“*Seal the Deal* is a great resource for new and experienced coaches, consultants and others! I found the straightforward approach that Pomerantz used to share her considerable wisdom and experience to be very effective. It can reduce the learning curve for anyone that wants to make a difference and make money. I highly recommend that others read her book and buy one for someone else that would benefit from it as well.”

—Beverly Alridge Wright, president of Wright Choice Group

“In *Seal the Deal*, Suzi Pomerantz takes the intimidating world of networking, marketing, and sales and teaches simple, real-world, road-tested steps for how to integrate these key elements of business development into an actionable, sure-fire business development plan. Networking made fun, marketing made simple, and sales demystified . . . *Seal the Deal* is a winner! If you’re looking to build a prosperous coaching practice while also making a difference in people’s lives, you have to get this book!”

—Felice Wagner, Esq., CEO, Sugarcrest Development Group

# Seal the Deal



*The Essential Mindsets for Growing  
Your Professional Services Business*

The book that demystifies how successful coaches and  
consultants make money while making a difference

**Suzi Pomerantz**

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# Dedication

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To the loves of my life:

To Sir Bryan the Brave, for making sure no dragons got in my way

To Princess Samantha Ladybug, for being the CEO of everything

To Bruceasaurus, for infinite love

To Tadpole, for believing in me

To Jack-O, for unwavering support

To my grandparents, who were my best teachers:

Samuel J. Benoff taught me humor and patience

Helen Benoff taught me to view life as simply happy

Leon Shmukler taught me to swim with the sharks

Tania Shmukler taught me to temper life's tragedies with sweetness



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## Preface

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**I**t is no longer good enough to be good at what you do. You must demonstrate a baseline of excellence just to survive. The thing that will really make you stand out in your market is how effectively you can communicate about what it is that you do and how happy your clients are to have had you do it. You have to demonstrate results. You have to be able to sing your own praises, toot your own horn, and stand up and shout to the world, in a variety of different formats, why anyone should buy your services. Specifically, what you have to tell the world is why they should buy your services from YOU. It is not how good you are at what you do that matters; it is how effective you are at marketing and selling what you do. The good news is that you already have the skills to do this. You know who your audience is and what your message is. Now you just need to figure out how you can communicate your message in multiple different ways to reach all the varied styles out there in your intended customer base.

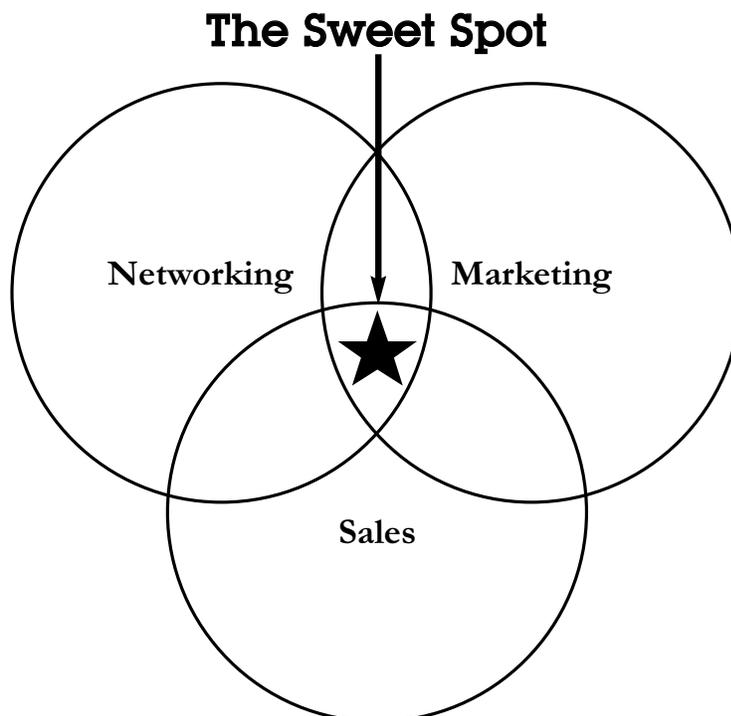
Not unlike the frustrated artist who lines the walls of his home with his own paintings and wonders why he hasn't been discovered, those of us who are just good service providers and not good networkers, marketers, and salespeople will be sitting home alone. Example: Many attorneys have told me that they create great work product or are fabulous litigators and they assume clients should just know that and somehow find them. It would be nice if it worked that way, but it doesn't.

That's why I wrote this book. **Tons of coaches, trainers, and consultants are great at their craft, but don't know how to sell their services to corporations and organizations.** Whether you are selling to companies or to individuals, if you are a self-employed professional, you will find in this book the essential mental perspectives that will open the floodgates to new business and repeat business. You will also find the all-access pass to expanding new business with your current clients. There are many books saturating the market about sales and selling. You can also find a fair number

of books on networking. There are quite a few materials about marketing. However, **it is the intersection of networking, marketing, and sales that is the sweet spot where you can seal the deal. There's no class that you took in school that taught you how to integrate the critical trinity of networking, marketing, and sales.** This book shows you how.

*Seal the Deal* will save you time. Attorney clients have told me that as associates, they were actually taught to expect it to take them seven years to get business from their marketing and rainmaking activities. SEVEN YEARS?! With integrated activity in the three domains (networking, marketing, and sales) mapped out in this book, you can reduce that cycle time by 85 percent or more. Some people believe that if you are good at networking, sales will happen. Others believe that if you are good at marketing, sales will happen. Many will tell you that if you are good at sales, there's a pretty good chance sales will happen. *Seal the Deal* will show you that if you are good at all three (networking, marketing, and sales), then sales are guaranteed to happen and you will build a six-figure business in a relatively short time.

**THE SWEET SPOT is not only where networking, marketing, and sales intersect; it is where you SEAL THE DEAL!**



## About the Format and How You Might Choose to Approach This Book

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**S***eal the Deal* is written from a coaching perspective, so it gently guides you through specific action steps to be taken to get your ideal clients. Each step of the book is set up as if you were taking a 10-week course on this material. Thus, if you approach this book as a self-study course, you'll be serious about trying out the suggested actions and you will see evidence of results in as little as 10 weeks.

Each chapter at the heart of the book is a step of the 10-step proven process. The first part of each chapter is a condensed actual transcript of a telecourse session on that subject, followed by additional explanation and worksheets to bring each step to life. The telecourse scripts offer several benefits, for those of you who choose to read them. You will get to know the participants, their fears, their successes, and their experiences as they learn the same 10-step process you will be learning. You will see their humanity and be able to form an emotional connection to the material through their experiences. The telecourse scripts are full of anecdotes that demonstrate the real-world relevance and examples of each of the 10 steps in the process. You will be able to be a “fly on the wall,” observing a group of highly educated, highly degreed professionals engaged in a powerful, real-life learning dialogue. You will find that you are being coached right along with these participants.

If you opt to approach *Seal the Deal* as a 10-week self-study course, I recommend that you put the book down between each chapter: Read one each week for 10 weeks and do the homework, try the actions, and use a journal to capture your observations and progress as you move through the steps. There is a good amount of worksheet space so that you can also write in the book and use it as a workbook.

Another option is the quick-study approach, for those of you who don't have time to complete the steps thoroughly. You can still get powerful results if you want to just get the highlights and skip the telecourse material in each

chapter. Just read the second part of each chapter, do the worksheets, and take the action steps. Be sure not to miss the summary points and worksheets in the last two chapters of the book.

You're too busy for that much? Then I recommend taking the Self-Assessment Quiz on the next page, and then going through the table of contents to hit just the specific highlights that were illuminated by your quiz results. For the impatient, I definitely recommend skipping the telecourse transcripts.

And maybe some folks will approach this book in the random inspiration method—meaning you could just pop it open on any given day and read whatever paragraphs jump out at you. That would be a great way to dive in if you are already a seasoned, successful sales practitioner seeking a quick review to fire yourself up and motivate targeted action.

However you choose to approach it, I appreciate your commitment to try something new, and I applaud your efforts at all levels. You are on your way to *Seal the Deal*.

# Self-Assessment Quiz: How ready are you? Test your “seal the deal-ability.”

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## **TRUE or FALSE?**

1. \_\_\_\_ I am confident and comfortable in the process of selling professional services.
2. \_\_\_\_ I no longer feel like I am just winging it or hoping for the best.
3. \_\_\_\_ I have a model, a process, and a roadmap in place for sales.
4. \_\_\_\_ I know the distinctions between networking, marketing, and sales, and I know how and when to use each one and all three together in my business development strategy.
5. \_\_\_\_ I know the nine mindsets of networking and how to leverage my networking skills in alignment with my business development goals.
6. \_\_\_\_ I know how to play the numbers game, manage my time inside the sales process, and easily set up meetings with prospects.
7. \_\_\_\_ I know the specific goal for each step of the sales process.
8. \_\_\_\_ I know how to handle gatekeepers and objections.
9. \_\_\_\_ I have a genuine and natural style for leading sales conversations with clients and I do not use any techniques, gimmicks, or tricks.
10. \_\_\_\_ I quickly build trust and rapport and I demonstrate my credibility right off the bat.
11. \_\_\_\_ I am adept at quickly grasping the client’s situation and I know how to integrate my success stories into the conversation to demonstrate how my services can help them with what the client’s business is going through.

12. \_\_\_\_ I provide value and support in the first conversation and create collaborative partnerships with my clients.
13. \_\_\_\_ I know how to subtly and masterfully seal the deal and seamlessly manage the transition from sales to service.
14. \_\_\_\_ I have sustainable systems in place for tracking my progress and managing follow-up.
15. \_\_\_\_ I have fabulous resources for proposals, pricing, and contracting.
16. \_\_\_\_ I know how to leverage excellent customer service into new business; I consistently expand the sale while serving the client.
17. \_\_\_\_ I know how to build business while billing time through referrals and lessons-learned meetings.
18. \_\_\_\_ I am skilled at letting go of my attachment to any particular outcome. I focus my energy on following the ten steps of the sales process and trust that the results will come.

If you answered true to all of the above statements, then put this book down and walk away! There's nothing in here for you. If you answered false to fewer than five of the above statements, then you are well on your way to sales success, and the notions in this book will help you fine-tune your business development efforts for ultimate success. If you answered false to more than five of the above statements, this book is just what you've been looking for to help you get on the path to sealing deals and succeeding in your business, so read on.

# Introduction

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**T**his is a book about relationships. More specifically, it is about managing relationships as assets. I know, I know—you thought it was about sales. It is. I once heard a speaker named Lou Heckler say, “Business moves at the speed of relationships.” He’s right. You may have heard the term *relationship asset management*.<sup>1</sup> If you constantly manage your relationship assets, your business will move at a constant speed. If you shift your focus or divert your attention, even for a moment, from relationship asset management, you will find that your business will slow down proportionately. If you think of sales as the vehicle that propels business, relationships are the engine and you are the driver. This book is your road map. How fast and how far you want to go is up to you. There are no limits. As Yogi Berra once said, “If you don’t know where you’re going, you’ll wind up somewhere else.” Selling professional services does not have to be one of those happenstance, if-you’re-lucky kind of things. You can have a plan, you can have systematic steps to get there, and you can have a road map to follow.

## **What’s in It for You**

You are great at what you do. You are so good at it, you’ve entered the world of self-employment and you have your own business as a consultant, a coach, a therapist, an attorney, a facilitator, an accountant, a chiropractor, a project manager, a trainer, an advisor, a whatever! Do you have a selling system that integrates networking, marketing, and sales? Where will your next clients come from? Where will your leads come from? Do you think of yourself as a consultant, a coach, a counselor, an advisor, a chiropractor, a project manager, a whatever, and not as a salesperson? As a sole proprietor or small business owner, chances are you are not only the president/CEO, but you are also the janitor, receptionist, CFO, and COO! And, you are, whether

reluctantly or not, the *sales executive* for your business. As Sam Horn of TongueFu has said, “a sole proprietor is a *sale* proprietor.” Likewise, if you are a solo practitioner, you must also be a *sale* practitioner.

You may be an experienced solopreneur looking for a structured format for sealing the deal and supercharging your sales to take your business to the next level. (A system is defined as a set of connected things or parts forming a complex whole, and as a set of principles or procedures according to which something is done; an organized scheme or method.<sup>2</sup>) The system set forth in this book applies equally well to seasoned practitioners as well as “the newbies.”

Or maybe you’re a retiring baby boomer looking for your next avocation. You may be an employee, tired of slaving away for someone else’s gain, ready to break out on your own to join the global, networked economy of free agents. Either way, you’ve probably considered some form of consulting as an option for what you can do to leverage and apply your corporate experience as a free agent. This book can help you make it a reality. In fact, I was already doing a six-figure business when I started applying the 10 steps I’ve laid out for you, and in the first year of using the system, I saw a 95.6 percent increase in revenues.

Your success is hinged on your sales ability. *Sales* is not a dirty word! Selling executive coaching, consulting, or any professional services to corporations can be challenging, particularly given the abstract, intangible nature of those services. Complicating that is our sometimes-negative perception about sales and selling. For many of us, the concept of sales conjures up images of sleazy used car salesmen, pushy telemarketing calls during dinner, the onslaught of catalogs that clog our mailboxes, or a sales pitch from a door-to-door solicitor or vendor. Worse yet, we think of spam, phishing, and other e-mail evils. For others of us, the activity required to generate sales causes us anxiety or feels intrusive or uncomfortable. We don’t want to force ourselves on others—we want to help them! Particularly for the coaching industry—which in spite of itself is a \$1 billion industry and second in growth only to information technology—generating business is a major stumbling block. The only way to impact this reality is to recognize that we can’t afford to be naïve about what it takes to create business opportunities. We have to get good at it so that it will take us less time to get the clients and we can spend more time doing what we love, which is working with the

clients. Most of the helping professions are a lot like coaching—they don't want to sell. They love the client work, but hate the work of getting clients. Yet we know that no clients equals no business. The most important part of running a business is keeping existing clients and acquiring new ones.

## **Developing New Business, Your Way**

*Seal the Deal* will guide you to take new actions and alter your mindsets about business development in a way that will open the door for you to grow your coaching/professional services business in the way *you* want. Once you understand and can use this book's systematic process, concrete approach, and focused format for selling professional services into organizations, you can easily *Seal the Deal* using your own natural style and personality. The steps are easily customizable and user friendly. If you picked up this book looking for tips, tricks, gimmicks, magic, secret formulas, or other marketing wizardry, you won't find them here. There will be no manipulative or pressure techniques, fear tactics, or slick shadiness of any kind. The system in this book is about honor and integrity, genuineness, authenticity, and honesty. It is a straightforward, no-nonsense approach, which is why it works for everyone who applies it in a way that is true to his or her natural self. There are no shortcuts. If you are willing to do the work, take the risks, and shift your perceptual framework, you will see results.

Many of the points in this book are discussed in terms of coaching and consulting, but these steps apply equally well to any professional service. Also, the discussion is primarily organized around the idea of a sole practitioner or small partnership selling into organizations at the executive level or to Human Resources; but with only slight shifts in mindset, it can also apply to business-to-business selling or to selling large-scale multi-coach interventions, large-scale change initiatives, or large-scale strategic implementation projects. None of the concepts presented here is rocket science or truly new information—but you might not have thought of them in the context of business development before.

A notable feature of this book is that you will learn an action-oriented selling system through an edited transcript of our *Seal the Deal* telecourse. The telecourse is a mastermind group of coaches and consultants who are taking their networking, marketing, and sales to the next level (the participants'

names have been changed to protect the innocent). There are 10 sessions of live group coaching conversation, and while we've edited out the small talk and personally identifying information, we've left the course content essentially intact. I have also included some of our most popular worksheets, templates, samples, and tip sheets for you to use as you create and fulfill your own Personal Strategic Business Development Action Plan in three distinct domains: networking, marketing, and sales. If you wish to listen in, audio of our telecourses is available for purchase. You can contact Innovative Leadership International for one-on-one sales coaching as well.

## Endnotes

1. Richardson, T., & Vidaureta, A., (2002). *Business is a contact sport*. Indianapolis, IN: Alpha Books.
2. *Oxford American Dictionaries*. New York: Oxford University Press USA, Oxford University Press, Inc.

## Overview of *Seal the Deal*

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**E**ach step begins with the dialogue from the corresponding telecourse session for that topic, and it is followed by additional guidance, strategies, worksheets, and guidelines. I recommend going through the sessions in order, as they build on one another, but each chapter is also usable on its own, so if you prefer to skip around, you will still benefit. At the end of the book, you will find additional resources and your own Strategic Business Development Action Plan for Networking, Marketing, and Sales template. If you approach this book as a self-study course, you will alter your mindsets about sales and walk away with actionable steps for building your business your way.

Why do I know this stuff works? Here's a bit of my story. When I left my career as a schoolteacher, I learned how to network by spending six months engaged in informational interviews—meeting everyone I could possibly meet to figure out what I would do next. How would my teaching skills transfer to the corporate workplace? The pattern that emerged from that experience was that people kept saying I should get into consulting and coaching. In fact, a few of the folks I met during that six months of interviewing wanted to hire me as the coach for their employees and clients! Thus, I started my business because I had clients. After two years, the initial engagements came to their natural conclusion, and I had to quickly learn how to generate new business. Applying what I knew about networking, and integrating a few marketing activities, I was able to go from \$10K in debt at year two, to generating sustainable six-figure revenues by year three of my business. Then I learned how to integrate sales activities into the game. The first year that I used the whole system in an integrated way in my own business, I was already six years into self-employment. I formatted the selling system by combining my networking and marketing experiences with the core concepts from sales training that I had been co-facilitating for lawyers and legal service providers—and I began to apply it to my own business. The system works for experienced consultants as well as those just starting

out. How do I know it works? Because I've sealed the deal in more than 110 companies and firms worldwide, and I started as a schoolteacher!

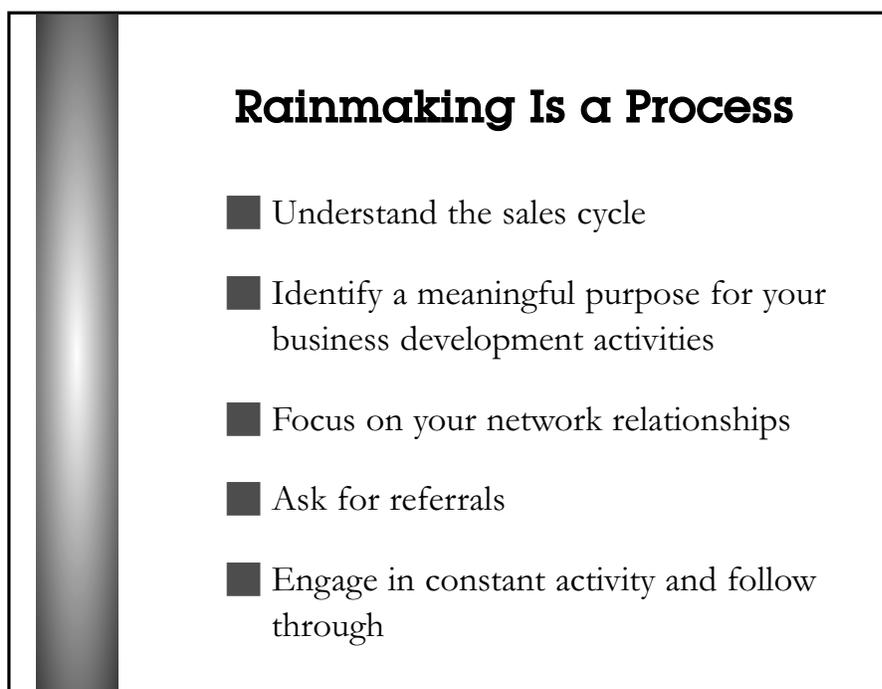
In my first year of applying the selling system you are about to learn, I saw a 95.6 percent increase in annual revenues. Does that sound like something that would interest you? If so, I encourage you to systematically do the homework actions and answer the questions in this book, and treat this book as if it were your personal sales coach. Here are some of the basics we'll be exploring more fully:



## **Barriers to Effective Business Development**

- What are your current mindsets about sales and marketing? About business development in general? About networking?
- What gets in your way? What are the obstacles that prevent you from making lots of sales?
- Where do you get in your own way?
- Where are you repressing your real and authentic self in an effort to fit in, impress partners or clients, or manage others' perceptions about you?

- What strategies can you employ that will allow you to bring forth your full and authentic self toward a meaningful purpose?
- Who are your allies?
- Where can you deepen relationships or create partnerships that will expand your sphere of influence and forward your business development goals?



**Rainmaking Is a Process**

- Understand the sales cycle
- Identify a meaningful purpose for your business development activities
- Focus on your network relationships
- Ask for referrals
- Engage in constant activity and follow through

## **The Power of Rainmaking**

Successful rainmaking begins with developing your own concept of what result you want from your business development efforts—you can't get there if you don't have a clear idea of where *there* is. Know where you want to go with your business and design steps to take it in that direction. The first step for many of us is to perfect a deep understanding of the sales cycle—and when and how to bring our best targets into it. Key strategies are to zero in on prospective clients you have identified in or through your network and to never, ever fail to ask for referrals. In other words, rainmaking means you are in perpetual business development mode—continually networking, marketing, and selling.

## The Numbers Game

- Cycle time: 6 months to 2 years
- 10 calls to get through to 6 people to schedule 1 sales meeting
- Referrals: 10 calls gets through to 8 people and yields 3 to 4 meetings
- 100 calls yields 10 meetings, which yields 1 client

## Playing by the Numbers

Allow me to explain. The numbers I quote throughout *Seal the Deal* are based on general research and, of course, vary greatly depending on the individual, but you can use these numbers as a baseline for understanding the numbers game involved.

- It takes 10 calls to get through to six to seven people to set up one meeting.
- It takes 10 meetings to get 5 second meetings to get one client.
- Therefore, it takes 100 calls to get 10 meetings to get one client!
- The figures for referrals are much better: 10 calls will get through to eight or nine people and yield three to four meetings or more.
- The entire process, from meeting a prospective user of your services to getting business from them, could take anywhere from six months to two years. That means that if you stop making calls to set up meetings to get new clients, in roughly six months, you will find yourself with a paucity of work.

This is why you need to engage in constant activity and follow through! Much of the sales process is about momentum.

## Know When to Get Out of Your Own Way

- Remember: Silence is leverage.
- Don't PITCH, analyze.
- Remember the 80/20 rules.
- Conduct an investigation.
- Tell stories instead of benefits.



## Getting Out of Your Own Way

An ongoing theme throughout *Seal the Deal* is avoiding self-sabotage—learning ways to get out of your own way. For example, know when to stop talking. Listening is the key to getting golden nuggets of information from your prospects as well as to eventually getting the business. Use silence to put the ball in their court.

No one likes to be pitched. It is better to use the time to determine with the prospect if it makes sense to do business together. Analyze their needs, their situation, what they are committed to doing/accomplishing, and where you might help. Approach the conversation with the assumption that you may not be the best match for their needs—and a willingness to walk away.

In the long run, 80 percent of your business comes from 20 percent of your clients, so focus on providing excellent customer care and seeking repeat business from current clients. Ask them for referrals frequently throughout the engagement life cycle. Do not just ask for referrals at the end of a project, but plant seeds at the beginning and make referral requests throughout your service cycle with a client.

In any sales meeting, the listening/talking rule is 80/20—you should do 80 percent listening and only talk 20 percent of the time; the client should do 80 percent of the talking. Thus, to prepare for client meetings, you will be well served to prepare questions that will open up the client responses.

Apply the investigative, inquiry skills you already have to the sales meeting. Don't assume they can use your services; investigate the possibility with the prospect of where it makes sense to work together in a way that best serves their commitments/goals/objectives.

Tell stories that illustrate your results, wins, and successes with other clients so that your prospects can see themselves in your story and assume your services are the solutions to their needs.



**Create Space, Be Real**

- Trust yourself.
- Listen.
- Create space to breathe.
- Align with your authenticity and commitments.

## **People Buy from You for a Finite Set of Reasons**

Once you understand that there is a set number of possible reasons someone might buy your services, you can step aside from the personal attachment to the outcome of getting clients. Once you know the finite list, you can have more control over your reactions to the process. Your list might be like what the Sandler Institute teaches: People buy from you either because of their

pain and the belief that your products or services can eliminate that pain for them, or because they believe that your products and services will increase their pleasure or joy in some way.<sup>1</sup>

While the Sandler training is very powerful and useful, my list is a little bit different. Inquire within yourself to determine what your list looks like. People buy from you because:

- They like you.
- They trust you.
- They value the service you provide.
- They want your products or think your services will help them.
- They have some problem that you can help them solve.
- They trust the person in their life who told them about you.

If you keep your list in mind during your sales process, you'll know that once one or more of those things are sufficiently present in the other person (organization, etc.), then you can close the deal. The list above provides your litmus test for readiness to approach the close. Likewise, if none of the above is present in sufficient quantities to score the sale, it would be foolish to ask for business at that time.

## **No One Is on the Bench**

Networking and business development are not spectator sports. Not only do you have to be in the game, on the court, out in the field, or whatever metaphor speaks to you, you must think of everyone else in the world as also being in the game with you. There are no benchwarmers, which means that none of your interactions with any other human being is ever wasted. Every moment is an opportunity for building relationships—for speaking your vision to everyone all the time. Another critical piece of this mindset is to operate from the assumption that everyone wants to help you. This assumption will allow you to make big, bold, outrageous requests that will encourage and invite people to contribute to your growing business and blossoming self.

How do you actively stay competitive in this rapidly expanding market? If you are not networking all the time, what is in the way of that? Even if you

spend most of your time with fellow coaching or consulting colleagues, they can be great networking and business development resources for you. Staying competitive in the market may not actually be about competition.

## Competition

Think about competition for a minute. In a personal services business such as consulting or coaching in organizations, even though you and all your would-be competitors offer similar or even the same services (assessments, 360-degree assessments, Myers-Briggs Type Indicator, individual coaching, team coaching, situational leadership, presentation skills, etc.), so much of what you do is unique to you as an individual. When you think about it that way, do you truly have competitors in your market?

Here's a mindset that better serves coaches to expand their offering into organizations and be able to provide larger-scale interventions than individual coaches: I've heard it referred to as *coopetition*, an amalgam of *cooperation* and *competition*. The idea is one of collaboration with competitors, or turning competitors into partners, by building alliances and joint ventures as a business development strategy. If you struggle with staying competitive in the market, identify those you perceive to be your biggest competitors and approach them to create coopetition arrangements that serve everyone and the greater good of the client organization. It is the old win-win concept that we facilitate our clients to attain, now applied to your own business growth strategy.

There is a psychology of selling, and it is equally important to manage your own psychology as well as understand the game from the prospective buyer's perspective. Selling coaching and other professional services is very different from selling products or programs. These services are abstract and intangible—it's not like you're selling Fuller brushes or Girl Scout cookies! You're selling concepts, competence, confidence—a host of outcomes that often are years in the making.

## **Navigating the System**

The *Seal the Deal* process uses clear navigation points and basic foundational elements. There's an assumed baseline of credibility: You have the training, experience, education, and credentials to deliver the service (whatever it may be) and get results. You have a track record of proven value (results/worth). You understand and can facilitate a sophisticated interview. You recognize when your prospective client is an educated and savvy consumer/user of your services. You are aware of and can manage your mindsets and attitudes during the process. You understand and can keep all your activities clear and consistent within a specific sales cycle. You constantly fill and track your pipeline of leads. You know your numbers and what it takes to play the numbers game to move people through your sales process. You build your business routinely using the technology of referrals, and you are always networking.

These are the basics. Of course, there's much, much more to each one of these elements, hence this book. Read on and have fun!

## **Endnote**

1. See their website at [www.sandler.com/](http://www.sandler.com/).



# Step 1

## Demystifying Selling and Distinguishing Networking, Marketing, and Sales

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“We are all continually faced with a series of  
great opportunities brilliantly disguised as insoluble problems.”

—John Gardner

**I**n this chapter, you will find the first telecourse dialogue, which covers the initial context setting for the course, and the theory and practice of the 30-second commercial. You will learn how to create, refine, and practice your own 30-second commercial to use when introducing yourself on the phone or in person, and when networking in order to have a response to that question everyone asks when they first meet you: “So, what do you do?” This first live script includes more dialogue than the others so that you can get a feel for the participants and their baseline of comfort or discomfort with the notion of business development. Hopefully, you will recognize elements of yourself among them and feel confident that this system will work for you.

After the dialogue piece, selling is further demystified with a few suggestions for how to reframe your thinking and understand your current mental barriers so that you can get your head in the game. There are a few worksheets for you to use to explore mindsets and mental positioning with respect to sales as well as a chart depicting the distinctions between the three critical domains of networking, marketing, and sales. From there we’ll explore time management, both as a mental barrier to selling and as an organizational process.

## **Telecourse Session #1: Your 30-Second Commercial**

### **The Difference between Marketing and Sales**

**[Suzi]** Before we get into the specifics of a 30-second commercial, I want to talk a little bit about the difference between marketing and sales activities. To start, let's have each of you say what you see to be the distinction between marketing and sales. If you don't know, that's okay too. I just want to get a sense of your thinking.

**[Len]** I think marketing is partly studying the market, and shopping around in the market, and sales is giving the pitch, and getting the contract.

**[Suzi]** What does that mean to you, making the pitch?

**[Len]** Telling people exactly what you do, and also connecting with what people need.

**[John]** I think of marketing as a kind of a strategy, planning and strategy, and that includes research. And I think of sales as the implementation, where you actually get out there and pound the pavement, press the flesh, make the human connection, and do the follow-up. But one of them seems more strategic, and conceptual, than the other.

**[Bill]** To me the marketing is stuff that I can do by myself, alone in my office, and the sales is stuff I have to do with another person.

**[Jeremy]** I've heard you speak on this topic before, Suzi, so I'm going to be giving some of your answers. Marketing to me is positioning yourself, deciding your strategy, and providing information. And sales is developing the relationship with a customer and getting them to sign contracts.

**[Suzi]** Yes, marketing and sales go hand-in-hand. Marketing activities are the things that you can do by yourself, in front of your computer, creating text, writing letters, doing research, all of those things that you said—that's right on target. Also marketing includes building a website, fine-tuning your website, writing articles, getting articles or books published, and creating your letterhead, your logo, and your business card. Those things, image and collateral kinds of things, are

the marketing activities. It's very easy to spend lots and lots of time on marketing activities. The bad news is, those things alone don't get you the contracts. They help, but in and of themselves, they don't get you the contracts.

So the time you're spending working on marketing is time that you're not spending on sales activities, and the trick with sales is that it's all about the numbers. (More on that later). It's all about how many sales activities you're undergoing in a day, how many prospective clients you have in your pipeline, how many times you're following up with folks in your pipeline. Because sales is a process, it takes time to move through that process. So all that time you're spending on marketing activities, while they're important and necessary, they're not moving you toward getting the contract. So I just want to make that distinction up front, because there's nothing wrong with doing marketing activities, but if you're like I was, maybe you're kind of afraid of sales because you're afraid of rejection, or you feel like you're bugging people, or you're just resisting it for whatever reason. It's much easier to focus on marketing and pat yourself on the back and say, "You know what? I'm doing what I need to be doing. I'm spending hours each day writing these letters, I've got it all fine-tuned and I'm ready to go, I've got all my materials in place, I've got my brochure ready." Well that's great, but it's not sales. I just want to make sure that we're not tricking ourselves into thinking that all the time we're spending on marketing is forwarding our sales.

[Len] I think that's a very important distinction because I have fallen into that trap. I am a sinner and I confess. And then you can really get discouraged—"How come I'm not getting the clients? What's going on here?"

**[Suzi]** Right, and it feels like, "Oh I'm working so hard. I've spent hours writing these articles. I've really got the words the way I want them. I've got all my materials ready. My letterhead looks great." You feel like you're working a lot, and you are, but it doesn't get you the clients directly. So I'm not discouraging those activities, but it's important to be very clear with yourself that on any given day, whatever amount of time you spend on marketing, developing marketing materials, or on marketing activity, you want to spend at least that time plus 50 percent more on sales activities so that you're getting a good balance. We all slip into wanting to do the marketing stuff, "cause it's much easier." And we can see the accomplishment much more quickly. You write a

document, you end up with a document. It's not like the sales process, where you can be in it for two years before you see results. Any thoughts on that?

[Len] I have a humorous take on it: Companies create marketing departments to keep their salespeople from wasting time. Get people who won't sell to stay home and do marketing.

**[Suzi]** Yes, getting out there and selling is hard at first. I've heard people refer to it as pounding the pavement, pressing the flesh, making the pitch, while it's really just about getting out there and creating relationships and talking to people.

What would you say is your gut reaction to the concept of sales and sales activities? Is it something that feels good to you, or is it something that you're resisting? Is it something that feels positive or effortless, or bad or uncomfortable—how does it feel to you?

[John] Maybe the word would be threatening.

[Jeremy] I guess my humorous response, if I could summarize in 10 words or less would be, "Isn't there something else I have to do?"

[Len] Sales makes me uncomfortable, especially if I don't really understand it. If I think that I have some sort of understanding about what I'm doing, I feel better, but sales is foreign to me, basically.

[Bill] Before Christmas I went into a cycle of going to meetings and all kinds of Christmas parties, the local business association, this association, that association. I was nervous and uptight, but I pretty quickly became used to it. It's just a lot of people like me showing up at these places, we're having the same feelings, but it's quickly dispelled. It's not so bad when you get in it. It's kind of like swimming in cold ocean water; you get used to it and later on it seems you're fine. You just have to be in it for a while.

**[Suzi]** You're talking about networking types of events?

[Bill] Yeah, Christmas parties plus a presentation at a Chamber of Commerce meeting where I met a lot of people, collected a lot of cards, and another presentation at a financial services company. It was all very exhilarating actually. It created kind of a high—because I was walking and quacking like a duck, and I seemed to be seen as one. And that seemed to be a good first step. And it's also good for me

to be able to transfer, to feel like my skills are generic and portable, and to know that this is a viable thing I'm trying to do—at least it seems like it from the response. It's encouraging when you get past worrying about if you'll pass for whatever you want to be passing for. And it's confidence building, and that's how you become what you say you are, in my mind.

**[Suzi]** Well, in one of our later classes, we're going to get into networking, and how to make the most of those networking situations, but right now I want to get back to basics. Just as there is a distinction between marketing and sales, there's also a distinction between networking and sales. So it's wonderful to go to networking activities, go to these meetings, meet people, give out your card, develop the beginnings of relationships. But again, that's not direct sales activity.

**[Bill]** Well, there's two things about what you're saying that explain my own psychological process. After the first week of January, I went into a crash. After spending a lot of time creating a flyer for a different type of business, and then going through all this networking, nothing emerged except people calling me up wanting to have lunch. But I don't have time for lunch. I wasn't selling anything.

**[Suzi]** Right—you weren't selling. You were networking, you were marketing, but you weren't selling.

**[Bill]** And it seemed discouraging. I was doing some right things, but I wasn't selling.

**[Suzi]** Right, all of these activities are right things, and I'm not going to say "Stop marketing, stop networking." You've got to keep doing all of that. But let's not delude ourselves into thinking we're selling, and let's not be surprised when that doesn't yield contracts, clients, business dollars, etc.

**[Bill]** In other words, I hadn't taken a shot at the eight ball yet . . . I think I need to do that.

### **30-Second Commercial Basics**

**[Suzi]** Ready? Let's start with the 30-second commercial. We're going to get into what is sales, and the sales process, in later classes, and I hope that you can be patient with postponing that, because I want to

give you something to use right away: the 30-second commercial. This is not your typical elevator-speech or an infomercial to memorize and deliver with robot-like precision. It is an introduction you can actually start working with right away.

As we build skills in this telecourse over the next nine sessions, you'll start to get an understanding that there is a sustainable, repeatable process behind sales; there are specific steps and activities that you can embark upon. You'll know how to do it, and one of the first steps is nailing down your 30-second commercial. Because that's the thing that's going to open doors for you, get phone calls through for you, and help you fine-tune some of your networking activities.

So we'll start with the basics of your 30-second commercial so that you can take a modular approach. The first thing you want to have in it is, of course, your name. And then you want to have something in there right off the bat that gives the sense of what you do in a very concise way.

### **Key Pieces in Crafting a 30-Second Commercial**

- Your name, and how to remember it
- Credibility points about you or your work
- Whom do you help?
- What do you help them do?
- What energizes and excites you about what you do?
- Other impressive factoids

Why don't we go around the group and each tell a little bit about our coaching experience and what we hope to get out of this first class, and then we'll get into fine-tuning your 30-second commercial. You want to kick it off, Jeremy?

[Jeremy] Why don't I kick it off with my 30-second commercial? I provide Leadership-Development and Coaching to Executives. I partner with businesspeople to solve the kinds of dilemmas that wake

them up at 3:00 in the morning. I'm known for being both a trusted advisor and an intuitive person. I love what I do, and I'm relentless in my determination to help organizations and individuals develop. I've been doing coaching for about 15 years, and I've decided that that's all I'm going to say—it's always going to be 15 years from now on.

**[Suzi]** Why is that?

[Jeremy] Something about getting older, you want to stop the clock on things you can stop the clock on. Some recent initiatives: I'm going to be giving a talk at a large psychological conference on executive coaching, I've been asked to be on some panels at the International Coach Federation (ICF), I'm nominating people to the Board of Directors, and something to do with grandfathering Master Certified Coaches (MCC).

[Bill] I'm a full-time psychologist and psychotherapist in Manhattan and Westchester, and I've been doing little bits of coaching in my office here for a couple of years, getting referrals from a friend of mine who has a full-time business. I do it to get out of the office more, and just take on a new challenge—because I'm pretty comfortable with what I do, I've been licensed since 1977. Around Christmastime, I thought I was all but signed off to coach two senior executives from a major financial services company with the promise of more to come. That got quashed by January 7, and I've been in the doldrums since. Still, I want to gear up, because I think the business cycle will reverse, and I'll have some big opportunities down the line to be coaching higher-up. That's the only place I'm really interested in coaching, because I make a decent living as a clinical psychologist, and I'm not interested in personal coaching. I really want to do corporate stuff. So I want to develop my sales approach so that when the pieces begin to fall back into place, I'm there and I'm ready.

[John] I'll go next. I'm John. I have a Ph.D. in Organizational Behavior, and I was on the Business School faculty of University of Florida for 20 years, and 6 years ago it came time for the mid-career change. So I created my own small consulting firm, and we specialize in dissolving resistance to change. I've had a lot of Organizational Development consulting in my past, and wanted to add the executive coaching to my bag of tricks. So I just did an Executive Coach Academy class, and I've written a book that will be out soon hopefully, on how to dissolve resistance to change in the workplace. Also, I'm giving a paper, if I ever

get the damn thing written, at a conference in D.C. on how to dissolve resistance to e-learning. So resistance to change is kind of my niche, or my specialty. My dilemma is I'm very, very good at the technical part, but not so good at the marketing and sales piece. So I'm hoping this class will imbue the skills—and probably more important some confidence—to take on that sales part of the buy.

**[Suzi]** John, what is your evidence that you are not good at the sales and marketing part?

[John] When given the chance, I don't do it.

**[Suzi]** But does that mean that you're not good at it, or that you would prefer not to do it?

[John] It probably means I'm scared of rejection. If someone holds my hand and does the introductory paragraph to someone, then I'm wonderful. But getting the ball rolling in the first place, and doing the self-presentation from ground zero, that's the part that seems to be the hang-up.

**[Suzi]** Thanks, John. That leaves Len.

[Len] I'm a clinical psychologist, just about as long as Bill has been. I've gotten into coaching and consulting because the idea really appealed to me, beginning a couple of years ago, and I've been refining my skills since then. At first I was practicing on a non-commercial model. I was working with families with a developmentally-disabled or a Downs Syndrome child, and coaching them in terms of managing their everyday kinds of issues. After a while, I moved my focus into commercial areas, and now I want to work more as a consultant and coach for upper-level executives in financial institutions. So I've been drafting and re-drafting a letter of introduction to one particular bank that I'm thinking of approaching, and I also wrote a newsletter, and I'm going to be writing more. Also, just yesterday I contacted a local Chamber of Commerce; I was scouting around to find information about the CEO of the particular bank that I'm interested in working with, and I contacted the Chamber of Commerce where he is a member. And they were so very welcoming of my call, I have an appointment with them and will introduce myself to them at the next meeting.

**[Suzi]** And Len, what has drawn you to the financial services world as your clients?

[Len] Well, the kind of consultation I want to do is with executives. For two reasons: One, there are a lot of very good banks in the area where I live. And the one that I'm focusing on is a growing bank. I've done a lot of investigation and basically I'm experimenting. I've talked with different businesspeople about my new endeavor in consulting. And while talking with a particular stockbroker about the bank that I'm interested in, I learned that he knew the philosophy of the bank CEO. Basically the CEO wants everybody to be very people-oriented in his banks, and very service-with-a-smile kind of thing. His service model is McDonald's, so I did my research: for example, McDonald's posts statements about its service approach on its website. So I felt great about that, plus I know this bank is a growing bank and I found a *Harvard Business Review* article that's really relevant. So I put together the ideas from McDonald's and the article and cast them in a way that I think would be quite appealing to the CEO; when he reads my newsletter he'll see I'm right on target for his concerns.

**[Suzi]** So you've tailored your marketing materials to what you have learned to be his philosophies and beliefs.

[Len] Right. Very specific that way. And so this has been a practice run. I wish it will turn out to be something, but it's really practice in refining my skills. And so I've also just begun to develop various kinds of inserts for a folder, so when I meet with people in banks, I'll have appropriate materials to show them. Besides referring them to my website, I'll have a little brochure that I can show them.

**[Suzi]** Keep in mind that marketing actions are not the same as sales actions. I'd like you to think about a strategy for making direct contact with the CEO or other decision makers in these banks, and asking for a meeting.

[Jeremy] Okay, Suzi, over to you.

**[Suzi]** My name is Suzi Pomerantz, and I lead leaders from chaos to clarity. I'm an executive coach, and I'm the owner of Innovative Leadership International, LLC, which is a leadership-development firm that specializes in executive coaching and training. And I have my master's degree in teaching, and I'm internationally certified as a master-certified coach. My coaching business began in 1993, and mostly I coach executives from corporate law departments, such as DuPont, Sears, Welch's, Tyco, and also across the country. I have

coached and trained executives at Lockheed Martin, at American Express, at the U.S. Postal Service and other government agencies, and primarily what we do in my company is help leaders exceed prior levels of performance and improve their leadership skills. So that's me, and what you just heard is my 30-second commercial. So part of what we're going to work on is . . .

[Len] Do you have that spiel posted on every wall in your residence?

**[Suzi]** No, I don't. I've just done it so many times I kind of have a bullet list in my head. It doesn't sound exactly the same every time. Jeremy can attest to that, because he's now heard it three, four times?

[Jeremy] Yeah, three times.

**[Suzi]** So it doesn't sound exactly the same every time, but I have the bullet list in my head for what I want to cover each time. I have a longer version for when I'm standing up in front of a room introducing myself. I have shorter versions of it for when I'm at cocktail parties, or for example, Len, when you go to your Chamber of Commerce meeting—that would be a good opportunity to have a finely-tuned **30-second** commercial when you walk around the room meeting people.

[Bill] What would your 10-second commercial be?

**[Suzi]** That I'm an executive coach and I focus on leaders to help them find clarity within chaos and I've coached and trained in over 110 organizations worldwide. That's basically the short version. Sometimes, when I have a little more time than that, I might throw in that I primarily work with attorneys and managers of corporate law departments, and I might list a few of the organizations I've worked with—particularly if I know my audience. When I'm talking to attorneys and executives, they want to know where I've worked before. They want to know if I'm capable of handling executives of their caliber. So I find that that's important for my target audience, but it may not be for yours. So part of delivering your 30-second commercial is to know whom you're targeting. You don't need to know that right off the bat to design your 30-second commercial, but it is helpful for fine-tuning it later on.

So Jeremy said, "I coach executives." That's very clear. Mine is "helping leaders find clarity" or "helping leaders exceed prior performance." To start putting your 30-second commercial together, think first about who you want to help, and what you want to help

them do. You also want to include something that gives you a credibility boost right up front. Jeremy's credibility boost was "I've been an executive coach for 15 years." Bill, your credibility boost is "I'm a psychologist and psychotherapist." You might want to throw in the number of years you've been doing that.

[Bill] I'm concerned that it wouldn't sound very impressive.

**[Suzi]** Well, it is when you talk about executive coaching. First of all, if you're talking to executives, you're a doctor, and that's impressive. You know what you're doing. With a psychology background, you know a lot about emotional intelligence that you can transfer to the workplace. Now, you also have to know your audience. I know that when I work with attorneys, many don't want to deal with psychologists, because then they feel like they're getting into something like psychotherapy, rather than executive coaching.

It depends on knowing to whom you're talking. If there's anything negative going on about therapy, you might not want to take that route. You might want to say what you've been doing as a therapist over X number of years, and how that's helped certain people. I'll give you an example: My husband is a clinical psychologist. Over the past couple of years, he has been branching into executive coaching. And when he talks to prospects, he doesn't necessarily have to mention that he has a private practice in psychology. He might say he's been working with high-powered executives on issues such as X, Y, or Z, and he might talk about the issues they've been working on in therapy, but he can talk about it in the context of business.

You can take your experience in your practice and turn it into language that's going to be relevant to the audience that you're speaking to. But that takes knowing something about them, too. So when you're designing your 30-second commercial, you want to design it to be generic enough that you can use it in most cases. You want something that you practice over and over and over again—something that you know so well that if I woke you up in the middle of the night and asked you to introduce yourself, you would be able to rattle it off.

So in crafting your 30-second commercial, the key points are your name, some credibility points about you, what it is that you do, and for whom you do it—whom you help and what you help them do. And anything else that you think might be impressive in the first **30 seconds**. I'd definitely recommend writing out your 30-second commercial.

But for now, let's just practice by thinking out loud: Knowing those key points, let's see what comes off the top of your head. Who wants to go first?

[Len] I'm Len, I've been a clinical psychologist for the past 25, 26 years, and I do consultation assessments, data-based feedback, and executive coaching for corporations and upper-level executives.

**[Suzi]** Great. Now one question I have for you is did you say "data-based feedback"?

[Len] Meaning based on data. If you do an assessment of some sort, like a 360-degree assessment, it's like an evaluation of skills within that office environment, and you do an assessment and then you get back together with the person that the assessment was about or focused on, and you go over the data with that person.

**[Suzi]** Okay. So you might want to find a more generic way of saying that. Because not everyone you're talking to is going to ask you, like I just asked, if they don't know what that means. A lot of folks are going to assume that they know, or they're not going to want to look stupid. Because here you've been a doctor for 26 years, so they're not going to want to show you, especially if they're a high-level person, that they have ignorance in any area. So you might want to find a very straight-forward, elementary way of expressing that so that it's not a jargon term that might cloud over for somebody the real effectiveness of what you do. That was an excellent first shot. Next?

[John] I help leaders build support for and lead controversial change projects. I've just written a book describing a new way to dissolve resistance to change in the workplace. You know how employees and managers treat change with skepticism, even outright hostility? I turn that resistance into commitment and support. I specialize in coaching executives who are leading a difficult change project, and I'm particularly effective at helping leaders deal with the people problems of change.

**[Suzi]** All of that is great, but it sounded like you were reading rather than talking. Can you do that without reading it?

[John] Not today, but yes I can. By the way, a tool I often use for memorizing lines in situations like this is just writing it down. A lot of times, that helps me a lot. So if I wrote something down a hundred times, I would remember it.

**[Suzi]** Well, it also depends on your learning style, too. I'm the kind of person who'd feel trapped by having to have the same words every time, which is why I opt for the bullet list in my head of the points I want to cover. That way I have the flexibility to have it sound slightly different every time, but still have the same points. I get bored easily, so the modular approach allows me to mix it up a bit.

[Jeremy] My style is to have a trigger word for each thought, so there are four or five trigger words that I can use to remember five things.

**[Suzi]** Excellent. So that's something to take into consideration as you're writing and practicing your 30-second commercial. What's your learning style? Are you like John where you need to write it down 100 times? Are you like me where you just want to write a bullet list? Do you want trigger words like Jeremy? Part of having an effective 30-second commercial is knowing how you work best, and imagining yourself in different situations. The best one is the elevator test. Nine times out of 10, you'll be in an elevator, riding up with somebody to a different office in the building, and you and that person are the only people in the elevator. Well, you could stare at the floor, you could stare at the numbers, or you could talk to the person. And in an elevator, you have **30 seconds** or less to actually make your point.

Think about that scenario, or think about being at networking meetings and how quickly you meet people there. Think about being at conferences when you have a break in between sessions and you're meeting people, or think about being at social parties or weddings or brunches or lunches with family and friends and meeting people there. Strategize various contexts in which you'd want to introduce yourself. As you think through different scenarios where you might say your commercial, determine what your method will be for practicing it.

[John] I have a question on credibility. The only credibility piece I've mentioned is books that I've written. Should I throw in something about my Organizational Development consulting past?

**[Suzi]** I would definitely say you have a Ph.D. in organizational behavior. That's definitely credible when you're talking about executive coaching. Other credibility points include the number of years you have worked in a particular field, any books you have written, any degrees (master's, doctorate) that you have earned, and any impressive clients you have worked with. For example, I don't have a

doctorate, but I have the credibility of having worked with some of the big Fortune 500 companies. So that's what I use. Okay, who haven't we heard from?

[Bill] Me. I'm Bill, I'm a psychologist with 25 years of experience. I coach senior executives and high-potential employees in the banking and financial markets to achieve performance—wait a second, I'm reading this, hold on.

**[Suzi]** That's okay.

[Bill] My name is Bill. I am a psychologist with 25 years of experience coaching high-potential employees and senior executives to achieve superior performance and results in leadership through a high-impact coaching relationship.

**[Suzi]** That's great! Now, another thing to think about is that you never know whom you're going to be meeting at any stage of your life, no matter where you are. So your 30-second commercial has to be simple enough that you could communicate to someone who's not an executive, because they might be married to an executive, they might be the son or daughter of an executive, or they might have a client who's an executive to whom they might want to refer you.

I think all of you did a really good job of having your 30-second commercials be clear and simple enough that they don't just speak to the executive-level person. That was great. So I would say in terms of fine-tuning them, practice them on people in your family or with people you see on a regular, daily basis. And if you're isolated and you don't see anybody, call somebody up and practice on them. Your homework assignment is going to be to practice this at least 15 times between now and next week's call.

[Jeremy] I have an image of sitting down at a table with a two year old, and they look at you and they don't blink. You're sitting at the table and you're giving them dinner, and then you're telling them, "Hi, my name is Jeremy," and doing the commercial.

**[Suzi]** Yeah, why not?

[Jeremy] Oh, it was just a funny idea to me.

**[Suzi]** Well, what's going to happen is, depending on the people you practice it on, you're going to get different reactions. And if you're open to coaching from the people you practice it on, you'll find

different ways of fine-tuning it. You don't have to take everybody's feedback to heart, but I would think a three year old would have a lot of valuable points for you, if you're open to it.

So back to the homework assignment: Practice your 30-second commercial 15 times—you have to find 15 different ways to practice it. So that means 15 different people, and include yourself as one of those people, meaning practice it in front of a mirror. I would try to do it face-to-face. If you can't, do it over the phone. As you find different ways of practicing it, allow it to evolve and be fine-tuned, but keep in mind the key points: that you want to have credibility, you want to say what you would do, whom you help, and what you help them do. And then you want to make sure it's within 30 seconds.

The shorter and more succinct you can get it, the better. But practice it until it starts to feel natural, and see what happens. Observe as you practice it 15 times over the next week. Observe how it evolves, and observe how you feel about it, and observe how natural or fluid it starts to feel. We'll kick off next week by talking about that. Any questions? Comments? Thoughts? Observations that anybody wants to share at this point?

[Jeremy] Well, this is backing up a little bit at this point, but one of the advantages of this class being small is that Suzi's really going to have a chance to coach us in depth, and maybe we'll have a chance to coach each other, getting to the nitty gritty. And I guess that's a disadvantage, too—there'll be no hiding here.

**[Suzi]** I want you to feel free to be as vulnerable and open as you can on these calls, because that's how you're going to make real progress and find out where your personal stumbling blocks and barriers are so that we can move through them.

[Jeremy] Before we all hang up the phone, I'd like to say that your process, Suzi, reminds me of what's called stroke production in tennis, which is as you get more efficient with your strokes, you can produce them better and play the game faster and harder. So one of my goals is not only to be out selling, but to get two more company clients, which could be either large or small companies, by the end of the 10 weeks. That's a personal goal I'm going to set for this.

**[Suzi]** Okay. I want to tell you that's a stretch goal.

[Jeremy] Yeah, I like stretch goals.

**[Suzi]** Good, because 10 weeks is a very short time in the sales cycle, and we're going to talk about the sales cycle next time.

[Jeremy] I know, but I have a couple irons in the fire, so I'm cheating a little bit.

**[Suzi]** Oh good, because if you were aiming for two new clients from start to finish within 10 weeks, I'd say that's very aggressive, I just wanted to be clear about that. Yeah, absolutely nothing wrong with aggressive goals.

[Jeremy] Suzi, do you want to comment?

**[Suzi]** First of all, I want to completely acknowledge that Jeremy gave me my first experience as a teleclass instructor a few months back. He said, "Why don't you just come and do one and see how it goes?" That made this teleclass possible, and I have to tell you that I really enjoy this format, much to my surprise. My formal training is as a teacher, and I do a lot of teaching in front of the room, plus I'm a visual learner. So I had a lot of preconceived notions that teleclass learning might not be the best format—and I'm happily proved wrong. So I'm really looking forward to working with you all for the next 10 weeks and having all of you accomplishing what you want to accomplish in terms of sales.

So, Len, we'll look forward to hearing how your 30-second commercial went at your Chamber group.

### **Homework**

Practice your 30-second commercial 15 times. Practice it in front of a mirror, practice it over the phone, and practice it as many times as possible face-to-face with different people.

Fine-tune it as it evolves and observe how you feel about it, and how natural or fluid it starts to feel. As you experiment with different ways of saying it, keep in mind the key points: that you want to have credibility, you want to say what you would do, who you help, and what you help them do. And then you want to make sure it's within 30 seconds.

## **Losing Negative Baggage**

In his book *Let's Get Real or Let's Not Play*, Mahan Khalsa shows us the problem: “With due respect to true sales professionals, the notion of sales and selling carries a lot of negative baggage. It is the second oldest profession, often confused with the first. No matter what you put in front of or in back of the word ‘selling’ (consultative, solution, visionary, creative, integrity, value-based, beyond), it still ends up with the sense of doing something ‘to’ somebody rather than ‘for’ or ‘with’ somebody.”<sup>1</sup> Often, even the best-intentioned sales and marketing books out there teach us tips, techniques, gimmicks, tricks, or other manipulations. Until you are clear about who you are, who you help, and what you help them to do, you are ill-equipped to make any kind of offer to your prospective buyers. The whole goal is to make them an offer they can’t refuse. Mark Joyner calls it “the irresistible offer” and in fact wrote a fabulous book<sup>2</sup> by that title. Joyner says that in their busy lives, prospective buyers are being bombarded by thousands of marketing messages daily, which means we have less than three seconds to get their attention and make an offer so attractive that they simply must buy our services.

Once we take the time to understand our mindsets and the societal/cultural mindsets pertaining to sales, then we can begin to reframe these important activities in a way that supports us and sustains us, rather than depletes us or stresses us. It is possible to transcend dysfunctional sales practices and simply help people in ways that they will appreciate. Sales feels uncomfortable when it is not aligned with core values. My Grandma Helen always said, “Life can be beautiful.” Well, I’ll borrow her attitude here and assert, “Sales can be beautiful.” You get to break out of the mental chains, change the game, and create a new dynamic around selling—one that is meaningful to you. When it is integrity-based, it gives you energy because it is linked to your core values.

## **Helping Professions and the Conflict with Sales**

Coaches and consultants are not unlike the other helping professions. Self-employed doctors, lawyers, accountants, artists, and mental health professionals often sabotage their own efforts to make a healthy living or

amass personal wealth by not engaging in prosperity-generating mindsets. They are rarely taught or trained in a systemic sales process, and often are not aware that one even exists, so they find themselves truly committed to helping others and hoping that that will be sufficient to attract clients. They have a helping mindset and are hoping for sales. Often they have a negative view of sales and perceive it to be about forcing oneself on others, or pushing people to do something they don't want to do. Reframing their current sales mindset to one of helping and meaningfulness would allow them to integrate their commitment with sales activity.

The other thing I see a lot is people who may be excellent practitioners, but often are not businesspeople or salespeople. To truly succeed in business, we must be coaches who think like businesspeople and we must consider ourselves to be the sales executive in our own businesses. If we think of sales as helping others determine if our services and products would be useful to them or not, we can begin to integrate our commitment to helping with our need to sell. I approach every sales conversation seeking ways in which I might help. There are no pitches, no agendas, no attachments to closing. In this way, I can feel good about selling—I have reframed it from being something that people do to move used cars off a lot to being about making a difference with people, which is one of my core values. Identify your current mindsets about sales and see how you can reframe it for yourself to be something that aligns with what's true for you.

Use the Understanding Your Mindsets Worksheet to explore your mindsets and identify the changes you want to make to set off on your new adventure.

## **Worksheet: Understanding Your Mindsets**

1. How do you perceive sales? What is your definition of sales?  
\_\_\_\_\_  
\_\_\_\_\_
2. How would you describe your job? \_\_\_\_\_  
\_\_\_\_\_
3. How do you view your job in the context of the sales process/cycle?  
\_\_\_\_\_  
\_\_\_\_\_
4. What are your core values? \_\_\_\_\_  
\_\_\_\_\_
5. How do you define success at prospecting? \_\_\_\_\_  
\_\_\_\_\_
6. How do you organize the prospecting portion of your day? \_\_\_\_\_  
\_\_\_\_\_
7. How do you measure your results? What do you measure? \_\_\_\_\_  
\_\_\_\_\_
8. What obstacles or barriers exist in your work? \_\_\_\_\_  
\_\_\_\_\_
9. What changes would you put in place if it was up to you to re-design your job description and work responsibilities? \_\_\_\_\_  
\_\_\_\_\_

*(continued)*

**Worksheet:**  
**Understanding Your Mindsets (*continued*)**

10. How do you prepare to call prospects? \_\_\_\_\_

\_\_\_\_\_

11. How do you identify targets and prospects? \_\_\_\_\_

\_\_\_\_\_

12. How do you qualify leads? \_\_\_\_\_

\_\_\_\_\_

13. What are the preconceived assessments you already have of the person you'll be talking to on the other end of the phone line? How do you view the person you are calling? How do you think they perceive you?

\_\_\_\_\_

\_\_\_\_\_

14. What is your intention on every call? Do you set goals for each call?

\_\_\_\_\_

\_\_\_\_\_

15. How much importance do you place on creating relationships with the targets you call? \_\_\_\_\_

\_\_\_\_\_

16. What structures for accountability have you developed and are they effective? \_\_\_\_\_

\_\_\_\_\_

*(continued)*

**Worksheet:**  
**Understanding Your Mindsets (*concluded*)**

17. What motivates you? How can you motivate yourself:

A. To generate more calls? \_\_\_\_\_

\_\_\_\_\_

B. To generate more appointments? \_\_\_\_\_

\_\_\_\_\_

C. To generate more qualified leads? \_\_\_\_\_

\_\_\_\_\_

18. What will it take to align your thoughts about selling with a key core value? \_\_\_\_\_

\_\_\_\_\_

Notes: \_\_\_\_\_

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## **Partnership and Service: Mental Positioning**

If you approach sales activities with a reframed belief system, it might look like partnership and service rather than bugging people or needing to sell stuff. In the Mental Positioning Worksheet, write an example of what each mindset means to you or what it could mean to your business development and delivery efforts. Try these mental shifts as you go about your sales actions each day and see what opens up for you.

## Worksheet: Mental Positioning

Write an example of what each mindset means to you or what it could mean to your business development and delivery efforts.

Authenticity \_\_\_\_\_

\_\_\_\_\_

Being useful \_\_\_\_\_

\_\_\_\_\_

Abundance \_\_\_\_\_

\_\_\_\_\_

Listening \_\_\_\_\_

\_\_\_\_\_

Imagination \_\_\_\_\_

\_\_\_\_\_

Creating team or partnership \_\_\_\_\_

\_\_\_\_\_

Enrollment \_\_\_\_\_

\_\_\_\_\_

Loving your work \_\_\_\_\_

\_\_\_\_\_

## Distinguishing Between Networking, Marketing, and Sales

People often misuse the term *marketing* to be an all-encompassing concept to mean everything from press, exposure, pricing, referrals, networking, and branding to sales, business development, rainmaking, and getting new clients. Marketing is often broadly used to refer to the act of getting your message/product/service to market as well as to define the materials and design of your image. I'd like to try to un-co-mingle the three main concepts of networking, marketing, and sales for you. Once you have a clear understanding of the distinctions between these terms, you will be able to manage your time so that you are leveraging each piece of this critical trinity to get to the sweet spot where deals are sealed.

In a nutshell, networking is about relation, marketing is about preparation, and sales is about implementation. What does that mean? Figure 1.1 will give you specifics about each one, but basically, networking is the relational aspect of your business. It is connecting with others for the purpose of sharing resources, information, leads, referrals, ideas, etc. Cultivating a working network of relationships is crucial to your business development system, but in and of itself will not be the way you build or expand your client base. Marketing is how you will prepare yourself to take your unique identity package, your irresistible offer, and your message to market. This involves a lot of strategy, design work, writing, and outreach, but those things alone will not get you the clients you want. Sales activities are about implementing your business development strategies. Simply put, sales involves making appointments, seeking to be of service, making fabulous and bold offers, and asking for the business. Your goal is to master the integration of where preparation and relation meet implementation.

Relation + Preparation + Implementation = CLIENTS

Or, stated another way,

Networking + Marketing + Sales = \$\$\$\$

Many savvy and successful businessfolk will tell you that it is not a 1-to-1 ratio, and that it is most important to spend the bulk of your time in networking or relational activities. If you think of systems, you have to put a lot into the system up front to yield the desired output. Networking and

marketing activities are the precursors to sales activities, all of which are necessary input. It isn't magic. Your networking and marketing activities do not always just naturally lead to a hot prospect and then you turn on the sales juice or begin the sales process. Although that will happen on occasion, wouldn't you rather be in the driver's seat than waiting for your networking and marketing efforts to pay off? There's no need to wait for someone to ask you to dance; you get to take the lead and thereby control your time, your efforts, your results, your business. Taking action in your sales process from the start will dramatically reduce the time to close even while you are building your network and creating your marketing materials and strategies.

Figure 1.1 provides more detail about the distinctions between the three keys to success. If you take only one thing away from this book, my core message is that you need to be taking action in *all three domains* simultaneously to grow your business.

**Figure 1.1:  
Distinguishing Networking, Marketing, and Sales**

Networking	Marketing	Sales
<b>Relation</b>	<b>Preparation</b>	<b>Implementation</b>
Pipeline building	Positioning yourself	Contracting
Connection-seeking with genuine interest in others	Market research—studying the market, knowing what the market will yield, understanding market trends and influences, shopping the market for your competitors	Understanding sales cycle and process
Meeting people	Strategy, conceptual approaches	Knowing your hit rates and numbers
Talking to people and getting to know them better	Planning activities for acquisition, retention, or reacquisition of buyers	Tracking progress

*(continued)*

**Figure 1.1:**  
**Distinguishing Networking, Marketing, and Sales**  
*(continued)*

Networking	Marketing	Sales
<b>Relation</b>	<b>Preparation</b>	<b>Implementation</b>
Getting out there and creating relationships of all kinds	Alone in your office, in front of your computer	Making calls
Asking to meet other people—asking for introductions or at least contact information and permission to use you as a contact reference	Providing information about who you are and what you do: shameless self-promotion!	Setting up appointments with the express agenda of finding out about the current issues a prospect is facing
Follow-up	Showing people what you do, perhaps including pro bono work	Client meetings to tell people what you do
Manners, etiquette, social graces	Creating text, writing letters, researching clients and prospects	Proposals
Introducing people to each other with an eye to expanding others' networks	Writing and publishing articles, columns, books	Follow-up
Activities that yield human connection and interaction, not necessarily related to business	Speaking engagements, teaching opportunities	Moving people through your pipeline

*(continued)*

**Figure 1.1:**  
**Distinguishing Networking, Marketing, and Sales**  
*(concluded)*

<b>Networking</b>	<b>Marketing</b>	<b>Sales</b>
<b>Relation</b>	<b>Preparation</b>	<b>Implementation</b>
Nine mindsets of networking	Public relations and media, advertising	Activities that directly yield clients, contracts, business dollars
Finding out what people do, where they do it, why they do it, and what they want to do	Website or brochure building, fine-tuning, management	Action selling system
	Image and collateral things: logo, letterhead, business cards, etc.	
	Activities that yield informative materials (documents, speeches, advertising, promotional materials, stuff to hand out or direct people to)	
	Branding (sustainable, consistent, recognizable, uniqueness)	

## **Practice Tips: Networking, Marketing, and Sales**

- It is easy to spend lots of time on marketing activities, but those alone don't get you contracts.
- Time spent on networking and marketing activities is time not spent on sales activities. The ideal would be a 3-to-1 ratio: three units of time spent on networking for every one unit of time spent on marketing and three units of time spent on sales for every one unit of time spent on networking.
- The trick with networking is to keep active about following up with folks, even if they are not prospective clients and are not in your sales pipeline. Just keep looking for ways to help people you interact with and keep looking for more people to meet.
- The trick with sales is it's all about the numbers and tracking those numbers: How many sales activities are you doing each day? How many prospective clients are in your pipeline at any given moment? How many times are you following up with folks in your pipeline?
- Sales is a process, and it takes time to move through that process.
- If you are resisting sales (afraid of rejection, not wanting to bug people, feeling uncomfortable), the tendency is to focus on marketing activities and congratulate yourself for getting all your ducks in a row . . . that's not sales. Don't trick yourself into thinking time spent on marketing activities is directly forwarding your sales. Spend more time instead on networking so that you can collect people without feeling like you are asking for anything. Then look to see how you can link sales to your core values.
- Marketing activities are easier for most people in that you can see accomplishment more quickly. You write a document, you end up with a document. Sales activities can be ongoing for weeks, months, even years before you see a tangible result.

## Time Management: The Accordion Effect

“We have far more control over our energy than we ordinarily realize. The number of hours in a day is fixed, but the quantity and quality of energy available to us is not. It is our most precious resource. The more we take responsibility for the energy we bring to the world, the more empowered and productive we become.”<sup>3</sup>  
—Jim Loehr and Tony Schwartz

The biggest complaint I hear from coaches, consultants, and self-employed professionals is that you simply don’t have time to add sales or networking or marketing activities into your busy life. You know you should, but you are overwhelmed as it is. It’s like exercise. You know you should do it, but for some reason that extra hour of sleep seems more important, or you just don’t see how you could possibly fit one more thing into your already packed day.

Before we get into the subject of time and how to manage it, I have to tell you about a dynamic law called the Accordion Effect. The Accordion Effect applies to money as well as time, and both are important to any discussion of sales. The bellows of an accordion expand and contract in order to push the air through to make music. Time and money work the same way. Both expand and contract, come and go. Just as we know with certainty that the ocean tide will go out and it will come back in, both money and time follow the same energetic laws. They ebb and flow. Knowing this will give us access to a sense of continuity or even security.

If we apply this dynamic law to money, it means that money comes and money goes, and the good news is that it will always do this. Why is this good news? Because when applied to sales, it means that you can trust that money will always, eventually, come to you—and this concept allows you to give up the desperation and fear and attachment to “making the sale” or to seal the deal. It gives you the freedom to approach sales as a game. Like chess, once you know each piece and how it moves, you can begin to learn various strategies for success in the game.

With sales, once you know the 10 steps outlined in this book and the mindsets that support them, you can customize the game so that you will use your knowledge of how the numbers work to freeing yourself up to play. With money, once you know the dynamic laws of how it operates, you can let go of the belief systems that keep you stuck in a scarcity mentality. Likewise, with time, if you know that time can expand and contract like the accordion, then you can free yourself from the restraints of not having time to take the 10 steps delineated in this book (among other things). You have already had personal experiences of time expanding and contracting. For example, have you ever been waiting for something you eagerly want and felt that one hour seemed like an eternity? Similarly, when having fun or focused on something intently, you can find yourself in a zone where time (that same one hour) will seem like just a few minutes. Yet we can all agree that one hour is always 60 minutes and each minute is always 60 seconds, and that remains constant.

The application of this Accordion Effect is that it gives you some access to control or freedom, whichever motivates you. If time expands and contracts, that means you have the ability to cause it to do so, because the expansion and contraction of time exists primarily in your perception of it. You can control your perception, particularly in a busy, fast-paced world, by not giving in to the temptation of thinking you don't have time. You can impact your very real sense of not having time. You can practice intentionally causing time to expand. Try it next time you find yourself saying, "I'm too busy" or "I don't have time for that." If you have a commitment to any particular goal or result, you can overcome your timelessness by creating time. In other words, one way to manufacture time for yourself is to practice the mental shifts described above—to reframe time for yourself not as an immutable constant in life, but as something that can move and breathe, expand and contract, and be manipulated to create space for the music of life. When you experience time as compressed, breathe air into it by slowing down, practicing yoga or meditation, taking a walk, recharging your soul in whatever way you choose, and then returning to the tasks at hand.

It seems counterintuitive, but the act of taking your time when you seem to have none is exactly what allows time to expand. “Time management is not an end in itself,” say Jim Loehr and Tony Schwartz. “Rather it serves the higher goal of effective energy management. Because we have a limited number of hours in a day, we must not only make intelligent choices about how to use them but must also insure that we have the energy available to invest in our highest priorities. Too often, we devote our time to activities that don’t advance our mission, depleting our energy reserves in the process.”<sup>4</sup>

Understanding the Accordion Effect frees you from all sorts of limitations, ultimately providing the doorway to accessing power. The ability to focus on following recommended practices, step by step, while letting go of the results, letting go of expectations, letting go of judgments and assessments of yourself and your performance, and letting go of the outcomes, while at the same time having a clear focus on what is beyond the desired outcomes: This is the formula to get what you want in sales and in life. It is never just about the money. There is a purpose behind what you want money for. Holding a clear vision of what you want as the ultimate end result of what money can provide for you is the goal to strive for unflappably. There is an opposing push and pull, just like in the accordion, that will help you achieve your goals. Focusing on doing the practices, without attachment to any particular result, trusting that the process works, and relaxing into the game will guarantee a different operational space for you—one that is absent of fear and anxiety, and one that is playful and productive. Part of grounding your mindset in abundance involves expanding your inner capacity to accept and attract what you want. There are numerous practices in every spiritual and religious doctrine in the world that you can employ to open to joy and tap into trust. Figure out what practices will give you access to that place of effortless flow, and then go apply your 10 steps in the sales process.

## **Worksheet: Time Management**

As you explore how you currently go about organizing your time as it pertains to business development, don't concern yourself with recommended percentages or the right way of doing it. Simply observe and record how you are actually already organizing your time and see what shows up for you.

1. What percentage of your time is dedicated to sales activities as distinct from networking and marketing activities? \_\_\_\_\_  
\_\_\_\_\_

2. Of that percentage, what percentage of your time do you spend in each of the following:

\_\_\_\_\_ Identifying targets

\_\_\_\_\_ Setting appointments

\_\_\_\_\_ Client meetings

\_\_\_\_\_ Follow-up

\_\_\_\_\_ Professional development

\_\_\_\_\_ Other: \_\_\_\_\_

(Total should be 100%)

3. How would you prioritize and rank the activities in item 2 above? List in order of importance below:

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## **Practice Tips: Planning Your Week**

1. Decide what in your life is most important to you and make certain to allocate time to those items first.
2. Allocate time to make calls to set appointments. (How many calls does it take you to set up one appointment? How many appointments do you want to set up for each week? How many calls does that mean you have to make each day? How long will it take you to make those calls?)
3. Schedule any sales appointments you have set for yourself. (Include travel time and plan to arrive 5 to 10 minutes early. Include any preparation time you may need to prepare for the meeting.)
4. Allocate time for target research, proposal development, letter writing, card sending, and other marketing correspondence.
5. Allocate time for follow-up calls or account-servicing activities.
6. Allocate time for special projects and tasks that are non-sales or service related activities (i.e., networking meetings, marketing activities, expense reports, administrative duties, paperwork, other projects, and billable work).

## Endnotes

1. Khalsa, M., (1999). *Let's get real or let's not play: The demise of dysfunctional selling and the advent of helping clients succeed*. Salt Lake City, UT: Franklin Covey, p. 3
2. Joyner, M., (2005). *The irresistible offer: How to sell your product or service in 3 seconds or less*. Hoboken, NJ: Wiley.
3. Loehr, J., & Schwartz, T., (2003). *The power of full engagement*. New York: The Free Press, p. 5.
4. Loehr, J., & Schwartz, T., (2003). *The power of full engagement*. New York: The Free Press, p. 106.

# Step 2

## The Sales Process, Targeting Prospects, and Branding

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“Leap, and the net will appear.”

—Julia Cameron

“All life is an experiment.

The more experiments you make, the better.”

—Ralph Waldo Emerson

**W**e’ll begin with the telecourse in which you will have a chance to see the participants fine-tune and get coaching about their 30-second commercials in more depth. During this session, I introduce an integrated model of the sales cycle and the service cycle. This model is named the Bowtie Model because the shape of the figure illustrating the model looks like a bowtie. After introducing the sales process, I briefly introduce the concept of targeting.

You’ll have a chance to think through how you define your services. Then you will address “moments of truth” in your service cycle and ways to build your brand. The chapter includes a couple of worksheets for you to use in creating your brand and developing your own strategic target list.