

**RSW/US**

Agency-Client Relationship Experts

*“Check the Boxes”  
Counsel on Closing*

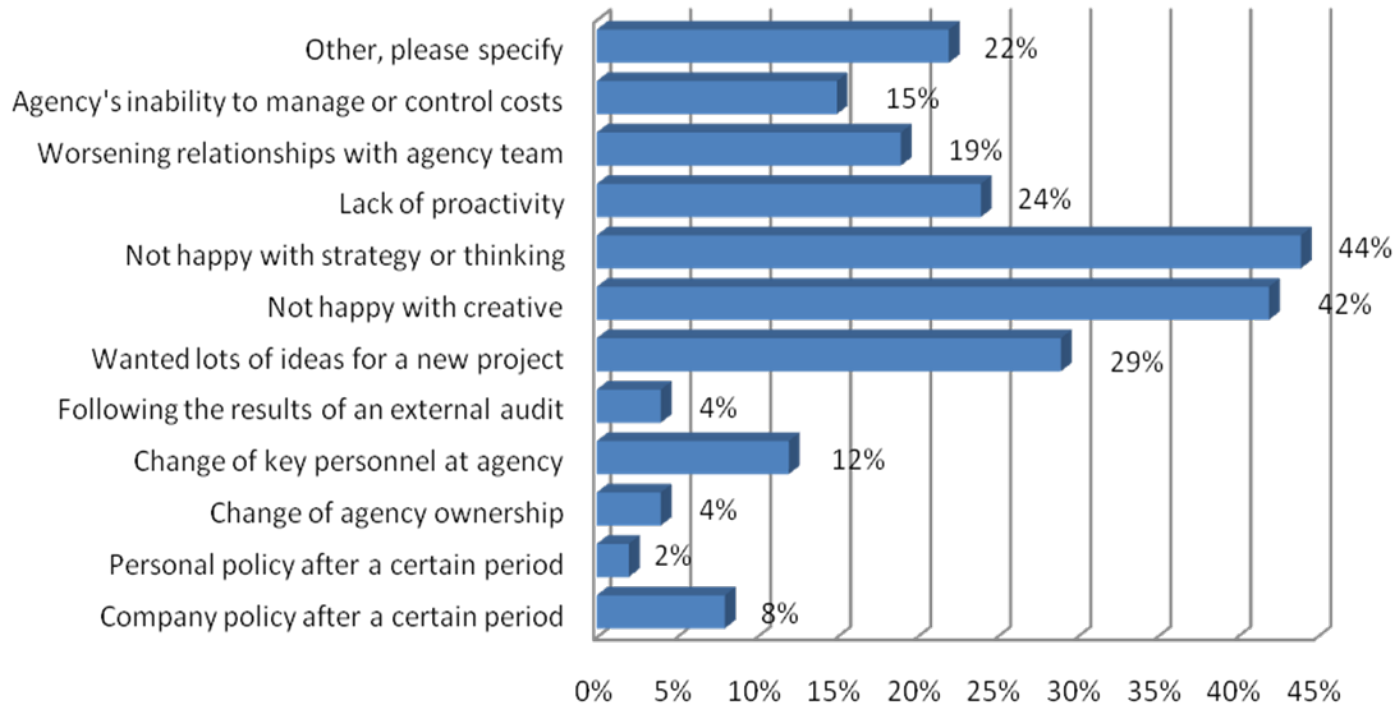
**September 8, 2011**

## Topic Areas to be Discussed Today

- **Know your audience: Re-cap of Marketer issues**
- **Getting to the first meeting**
- **Preparing for and managing the first call/meeting**
- **How to most effectively move to close**

# *Know Your Audience: Re-cap of Marketer Issues*

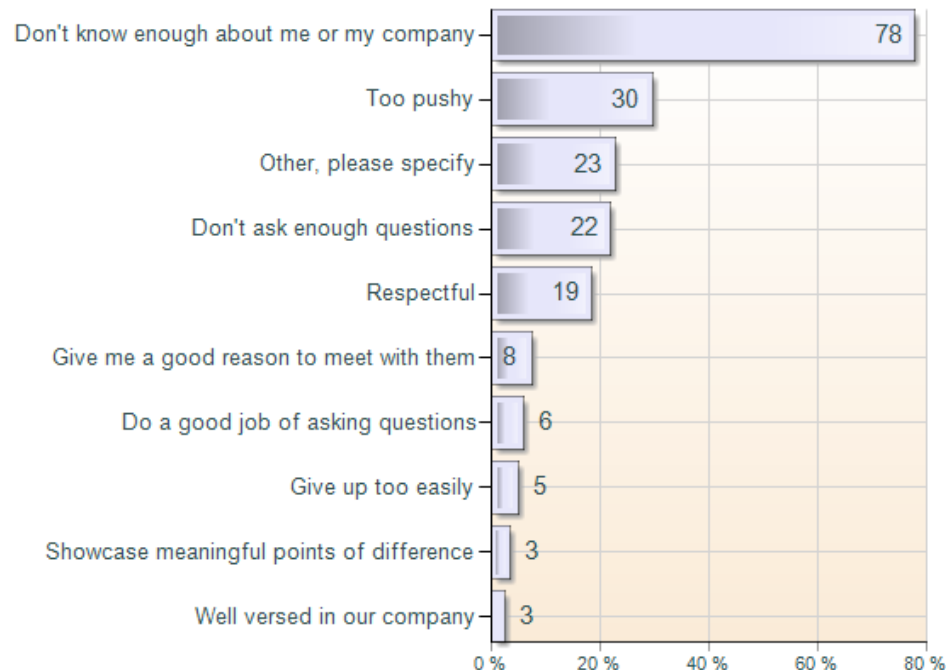
**Thinking about the last time you reviewed new agencies to one on board, why did you decide to review?**



***Keep in mind why marketers look – this needs to impact all you do leading up to and following an initial call/meeting***

## Marketers

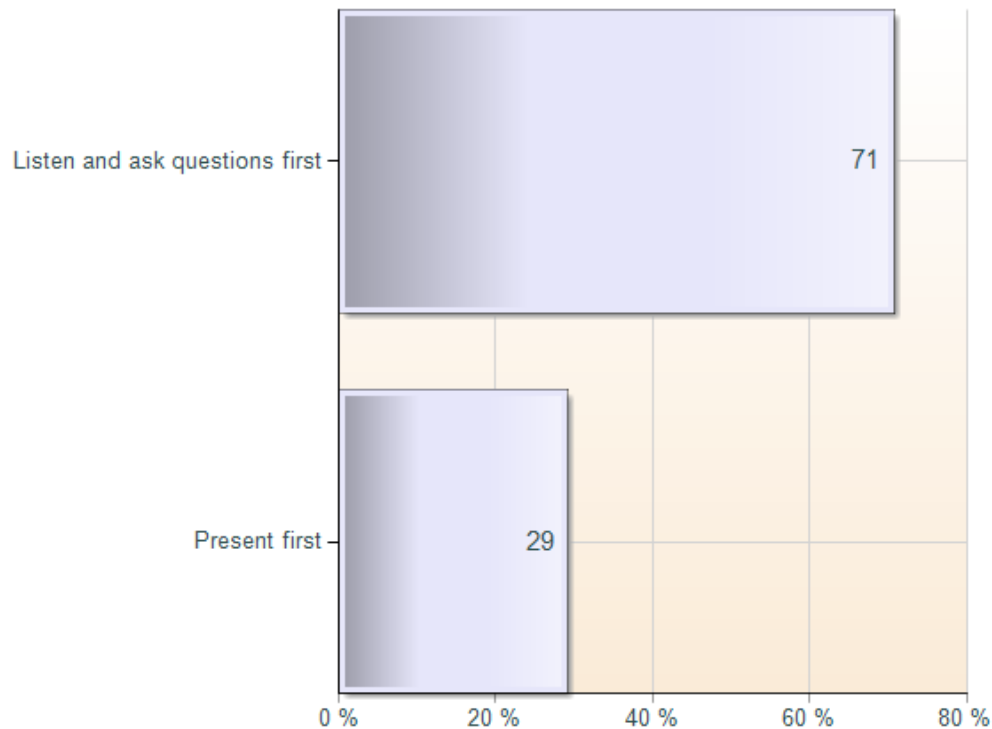
**What is your overall impression of agencies who contact you regarding a potential working relationship? Check all that apply.**



***And remember, Marketers say that Agencies don't know enough about them when they first approach them – or during the first call/meeting***

## Marketers

What do you prefer agencies do during a first meeting or introductory call?



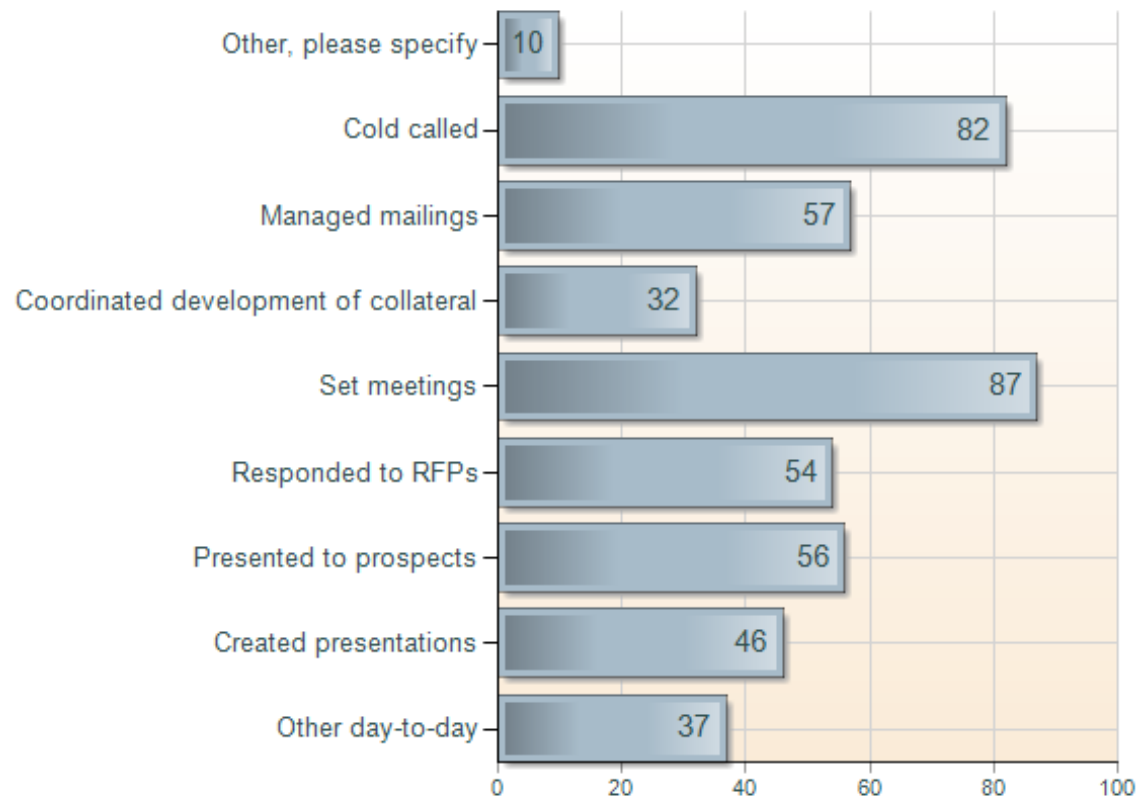
***Remember...you need to listen – this needs to be a thoughtful, strategic, well organized sale***

## **Marketer Reasons for Saying Agencies are Unprepared**

- Oversell expertise
- Don't listen enough
- Don't know enough about my needs/issues
- Unprepared
- Request for 15 minutes turns into an hour
- Don't present relevant information
- Too canned

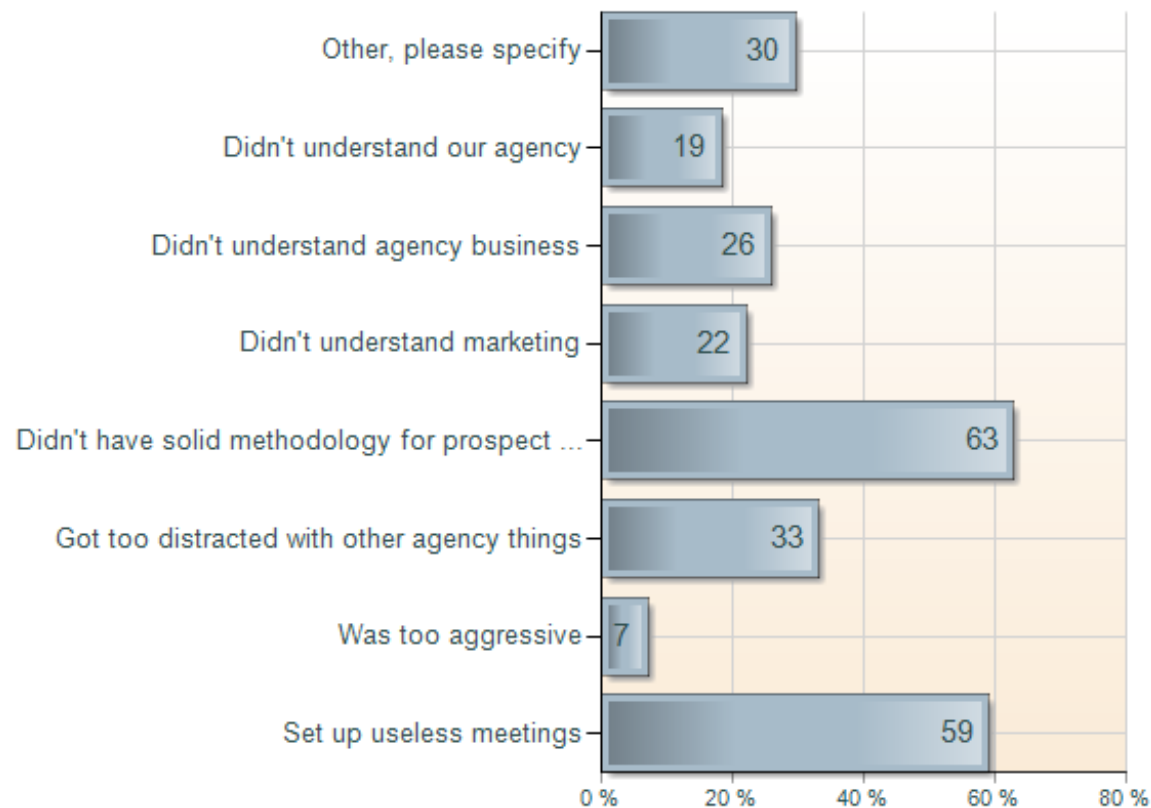
# *Getting to the First Meeting*

**Thinking about your last new business hire, please check all the things this individual was responsible for.**



***Regardless of what you do...hire inside or go outside....keep it focused!***

**Please select all the reasons why you think the new business hire was not that successful.**



***And if you hire inside...make sure they have the right experience and make sure they have a solid, well-organized methodology!***

# *Other Things to Consider*

## **Other Things to Consider**

Don't do new business  
by committee!

- Too many cooks make for slow decisions, limited focus, over-thinking issues

## **Other Things to Consider**

Don't assume lists are good to go,  
right out of the box

- Lists are only as good as the day you clean them.
- With marketers moving jobs every 18-36 months, even lists cleaned every 120 days might not be good enough.

## **Other Things to Consider**

# Make sure your website is up-to-date and easy to navigate

- Prospects want to see your work, who you've worked with, and your successes.
- They care less (relatively speaking) about your philosophy.
- Remember, only use ½ the words!

## **Other Things to Consider**

Make sure you have sufficient  
value-added content

- It's ok to “pound your chest” every now and then, but you need to establish “permission” by sharing ideas and insights – things that will be helpful to your prospect.
- Key is keeping in front of prospects with value added content ALWAYS!

## **Other Things to Consider**

Don't give up...it's not an  
overnight sensation!

- While we sometimes have clients win business in the first few months of an engagement, most of the winning occurs in months 7-12 and beyond.
- You never know when someone's going to be ready to make a move – so you ALWAYS have to be there.

## **Other Things to Consider**

**“Top 20” is nice,  
but numbers count!**

- Remember, it's partly a numbers game. You have to balance some level of customization with reaching out to a large number of prospects.
- If you're going to do a “Top 20”, do it on top of a larger initiative.

## **Other Things to Consider**

# Multiple mediums matter

- Different prospects will respond differently to different media. Some like traditional, some like electronic. Limiting yourself to one can limit your success.
- And just like a campaign that you might put together for a client, multiple mediums can mean higher level frequency of messaging – no problem with redundancy!

# *Recommended Process/Steps*



## **Recommended Process/Steps**

# Lead with mailing

- Keep it simple Stanley!
  - Cover – your logo/who you are
  - Inside – logos of your clients/sectors you work in/images of your work/snapshots of successes
  - Back cover – your logo/contact info



## **Recommended Process/Steps**

Leave voicemail and email to let them know it's coming

- You have to “warm” them up
- It's like a multiple media campaign you'd build for your clients – high frequency (with broad reach)
- Keep messaging simple



## **Recommended Process/Steps**

After mailing arrives,  
reach-out with relevancy

- Look up news
- Look them up on LinkedIn
- Talk about their world in your voicemails and emails



## **Recommended Process/Steps**

- Call/email 2-3 times in first couple of weeks.
- Be redundant!
- Use links, not attachments.

## **Recommended Process/Steps**

- After a couple weeks, leave a voicemail a week. Always follow with email.
- After a month+, dial it down to once every couple of weeks
- After a couple of months, put them on the VAE list.



## **Remember the Advice Marketers Give Us About** **How to Market to Them**

- Be relevant and creative in your approach
- Know my business
- Be honest
- Send samples and case studies that are aligned with biz
- Keep it simple
- Stop sending countless emails
- Demonstrate a true interest in my company
- Personal contact
- Understand our biz and competitors before calling us

# *Preparing for and Managing the First Call/Meeting*

## **Ultimate Goal**

# You Want the Prospect to Mentally “Check all the Boxes”

- Starting with the pre-meeting connects
- Keep thinking about the “boxes”, leading right into the intro meeting or call
- And keep it up following the meeting or call as you work your way to close

# You Want the Prospect to Mentally “Check all the Boxes”...Saying:

- Yes, they have the experience in my sector
- Yes, they have dealt with issues that I’m dealing with
- Yes, they have worked with companies like mine
- Yes, they know how to listen and ask good questions
- Yes, they are nice people that I’d like to work with
- Yes, they seem to value my opinion
- Yes, they appear to be rather strategic



# Pre Call/Meeting

## **Pre-Call/Meeting**

- Gather the facts (or what you believe to be the facts)
  - Check company website
  - Google News search the company
  - Find prospect on LinkedIn



## **Pre-Call/Meeting**

- Formulate 3-4 questions that you can use to showcase your knowledge about the prospect and their business. As an example....
  - Question about a particular issue that they might be facing that one of your clients faced.
  - Question about the state of the industry and how issues are affecting them – be ready to talk about how you've had to deal with similar issues.
  - Question about some dimension relative to their target – so you can showcase your insights.

# Remember What Marketers WANT During the First Meeting/Call

## WANT

- Ideas and how you're different from other agencies
- Ask questions
- Demonstrate strategic understanding before creative
- Curiosity about my business
- Thought leadership
- Being open to our ideas as well as presenting their ideas
- Proven capabilities/case studies
- Thinking, passion, people
- New and unique solutions
- Honesty

**And Remember What Marketers  
GET  
During the First Meeting/Call**

## GET

- The agency's opinion
- Creative highlights before strategy
- Portfolio of past work
- Often just a sales pitch on how great they are
- Not enough about what they can do for me
- Some cool examples that aren't tied to our real world
- Sales pitch
- Marketing speak



## **Pre-Call/Meeting**

- Email the prospect and spell out a desired agenda for them. Sample agenda:
  - Agency questions about company/market, etc. and general discussion about Client business
  - Review of Agency's initial strategic thinking based on preliminary study of business
  - Review of commonalities between Client's offerings/structure and Agency's experience
  - Overview of Agency's facts & figures (size, # employees, location, start date, etc.)
  - Review of Agency's work (if appropriate).

## **Pre-Call/Meeting**

- If you have a question or two prior to the meeting, don't be afraid to call or email a quick question.
  - Position it as “wanting to make the meeting as productive as possible”
  - It will let them know you really care and want to help

## **Pre-Call/Meeting**

- Call to confirm the day before and on the voicemail do a quick reminder that you're planning on coming to the table with some ideas/thoughts on the business that might prove of value.



# Managing the Call/Meeting

## **Managing the Call/Meeting**

# Rule #1: Keep the laptop closed!

- Start by reviewing the proposed discussion agenda

## **Managing the Call/Meeting**

**Rule #2: Don't ask them to “tell you a little bit about their business”**

- You need to start by taking control of the conversation and showcasing your knowledge expertise.

## **Managing the Call/Meeting**

# Rule #3: Think about the “boxes”

- You ALWAYS need to be thinking about what you want them to walk away with and as you ask questions and hear answers, subtly drop into the conversation how “we’ve done that”.

## **Managing the Call/Meeting**

# Rule #4: Build confidence

- Ultimately, you want them to check all the boxes and feel good about the decision to see you.
- Don't be cocky...but rather be smart and strategic in how you showcase the problems you've solved.
- When you can, drop in success metrics

## **Managing the Call/Meeting**

# Rule #5: Arm Them

- Give them things they can use to share with others when you walk out of the door
  - One-pager outlining strategic thinking
  - One-pager outlining “boxes”
  - One-pager with Agency facts & figures
  - Portfolio (hopefully you didn’t even show your creative during the meeting)

## **Managing the Call/Meeting**

# Rule #6: Don't leave without an action step

- Whether it's follow-up info you're sending or a proposal you're submitting, you need to establish a reason to see them again.
- Suggestion...now that you are armed with more information, suggest a more well thought out strategic plan (not tactics) to carry them through.

## **Managing the Call/Meeting**

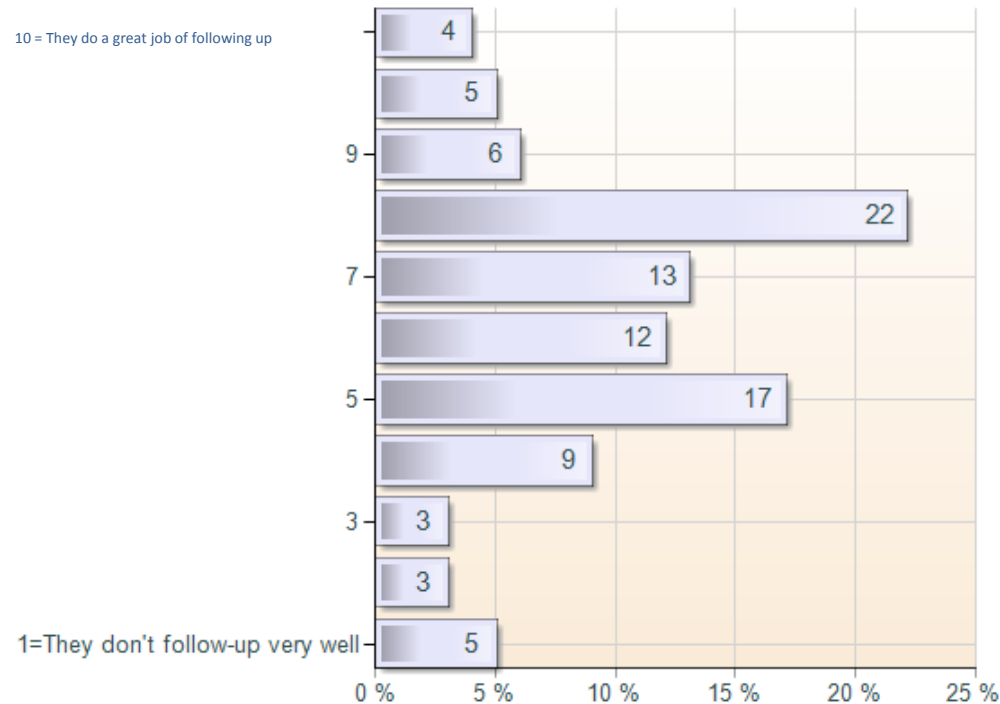
# Rule #7: Set up a 2<sup>nd</sup> meeting date

- While this may not always be feasible, can't hurt to try during the meeting.

# *How to Most Effectively Move to Close*

## Marketers

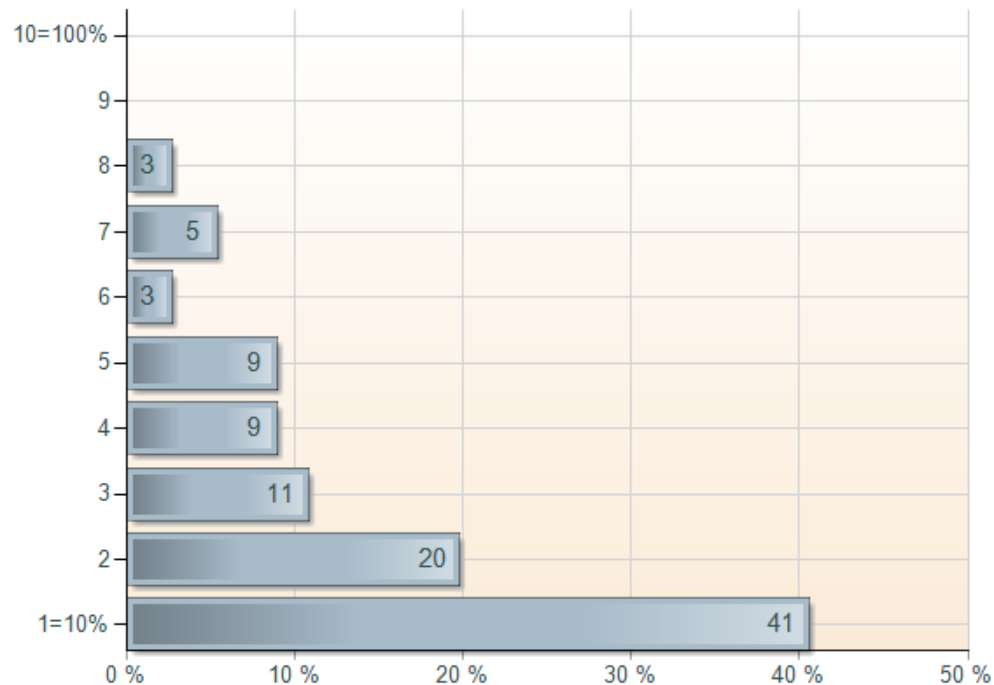
How well do you feel agencies follow-up after initial meetings or introductory calls?



***Remember, Marketers feel that Agencies are neither good or bad at follow-up after initial meetings.***

## Agencies

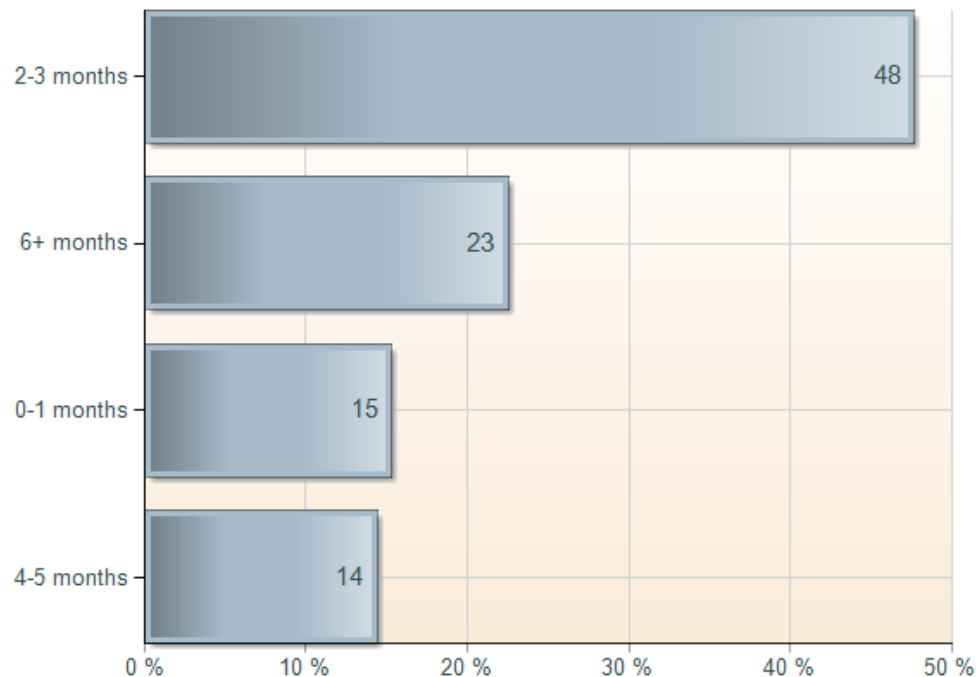
How often do you close business immediately after the first meeting or introductory call?



***Remember, few Agencies close business after intro calls/meetings.***

## Agencies

How long does it typically take to close business after the first meeting or introductory call?



***Patience and persistence is key...as it can take 2-3 months to close something after an initial intro meeting.***



## **Post Meeting – Move to Close**

- This is the toughest part of the process for a few reasons:
  - You are not on top of the prospect's priority list;
  - You are more than likely not a great sales person;
  - You want them, more than they need you.



## **Post Meeting – Move to Close**

*Steps to follow post meeting*

## **Post Meeting – Move to close**

# Step #1: Say Thank You

- Best to drop them a hand written note.  
Minimally drop them an email thanking them for their time.

## **Post Meeting – Move to close**

# Step #2: Recap (briefly) and outline next steps

- Topline discussion and delineate what the agreed to next steps are (with timing).



## **Post Meeting – Move to close**

# Step #3: Fedex response or follow-up materials and put in a call

- After you send the fedex (send it 2-day so it's less expensive), call the prospect to let them know you sent it.

## **Post Meeting – Move to close**

# Step #4: Call to confirm receipt

- The day AFTER it arrives, call again to confirm receipt and if you haven't set a follow-up meeting time, try to do it then.
- If the prospect doesn't answer, let them know why you're calling and let them know that you'll send an email with some potential times for a follow-up.



## **Post Meeting – Move to close**

# Step #5: Value-Add

- Before the next meeting, drop the prospect an email with a link to an article, or a note with a reprint from an article about something you think might be relevant to their world.
- Ideally it ties back to something you talked about with them.

## **Post Meeting – Move to close**

# Step #6: Stay on the radar

- If you don't get a response right away, don't fret.
- Pop in an occasional call (once a week for the first few weeks), drop a line with a new article link – or link to a thoughtful blog post you've written.

## **Post Meeting – Move to close**

# Step #7: Give it 4-6 weeks

- If you don't get any response, come right out and say "I don't want to keep bothering you, but wanted to see if there's still interest" as a way of trying to get them to respond.

## **Post Meeting – Move to close**

### Step #8: ASAP

- If you're asked to provide some kind of feedback, or proposal, or information, do it sooner rather than later.
- Even if the prospect doesn't seem to be in too big of a hurry, it's up to you to move them along.

## **Post Meeting – Move to close**

# Step #9: Keep it moving

- Always think “next step” in any follow-up meeting
- Always ask if there is anything that isn’t being addressed so it’s easier for them to tell you what’s bugging them.



## **Post Meeting – Move to close**

# Step #10: Close it!!

- If they don't want to run, see if they'll start by walking.
- Seal the deal!!

*Re-cap*

## Re-cap

- Know your audience
  - Marketers are looking for strategy, ideas, new ways to improve the way they do business
  - Listen, don't hard sell
  - Prepare (with questions, thinking, thoughts/suggestions)

## Re-cap

- Getting to the first meeting/call
  - Keep the overall effort and your people focused
  - Make sure all the parts and pieces are in place
    - Website
    - Value added content
    - Lists
  - Keep at it...it's not an overnight sensation

## Re-cap

- Preparing for and managing the first meeting/call
  - Remember to always “check the boxes”
  - Set an agenda pre-meeting
  - Use questions to guide and showcase experience
  - Arm them with material to carry out of the meeting and sell you
  - Always think next steps

## Re-cap

- Effectively move to close
  - Remember, few close quickly
  - Keep process moving post-meeting (respond ASAP)
  - Add value in your responses
  - Give them reason to want to move to the next steps
  - If they won't run, see if they'll walk



## Re-cap

- You didn't get into the business to be lead generators, list builders, or sales people



## Re-cap

- You got into the business to build great strategic, creative, and behavior changing work.

## Re-cap

- But in order to do that, you have to find the leads, build the lists, and act like a sales person.

## Re-cap

- While it might not be the most favorite part of what you do, it's even more critical today than ever before.

## Re-cap

- With bigger agencies going after smaller pieces of the pie, more agencies getting more aggressive at trying to win business to replace the business they've lost, and fewer networking and referral opportunities out there.

## Re-cap

- Think organized process

## Re-cap

- Think consistency of outreach

## Re-cap

- Think value-add from start to finish (to well after the relationship's been established)



## Re-cap

- Think “check the boxes” to help close the sale

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