Unidad 3
Lecturas
Marketing: Attracting the Potential Client

Steven C. Stryker

Reproduced from:
Guide to successful consulting with forms, letters and checklists

Snapshot
At this point you have stated your reasons for being a consultant and defined your business structure. With the groundwork laid, you must now turn to the heart of the consulting business-getting clients.

The first section of this chapter shows you how to define the services you are selling and the clientele who are purchasing them. Understanding the likely match and mismatch of services to clients helps determine a successful marketing method. In this chapter a sample marketing method is presented.

The first step to getting a foot in the client's door is the brochure-a terse pamphlet that neatly and pointedly describes the who, what, why, how, and when of your consulting practice. At a glance, the client can glean a basic sense of your skills, experience, and background. This initial contact is then furthered by letters, telephone conversations, or visits. Your object remains the same-setting up a full-scale meeting to discuss the feasibility of your providing services. At such a meeting, your appearance and presentation will give the client a clear sense of whether your services are necessary, and if so, whether you should provide them. At the same time, you have a decision to make. As discussed in the special topic, there are times when the consultant may decide that a particular client situation is too risky to pursue. How well you lay the foundation bears directly on your outcome. So let's begin.

Developing a marketing strategy
Given your decision to sell consulting services, the next question is, how? To answer this, let's first discuss the services you want to provide. Exhibit 4-1 describes some of the variables that make up a consultation. Exhibit 4-2 shows how these variables can be translated into a concrete consulting practice.
### Sample Task I

Study Exhibit 4-1 and form a picture for each kind of consulting you wish to do. Then ask yourself the following questions:

- Are the services portrayed concisely?
- Can the client easily understand what is being offered?
- Do these services accurately reflect my skills, interests, and experience?
- How well do my services match the potential client's needs, and are they competitive with other consultants?

#### EXHIBIT 4-2

**Service Examples**

1. *Organization Development.* Consultant assesses organization to ascertain strengths and weaknesses of all primary functions and ways to cope with change. Off-the-shelf techniques are used in producing a white paper. Consultant is under contract.

2. *Executive Recruitment.* Consultant seeks chief executive officers (CEOs) for nonprofit organization. Has unique cross-exchange program for introducing candidates to clients, and vice versa. Working alone, consultant receives a finder's fee, a percentage of a CEO's first-year salary.

3. *Quality Control.* Consultants in a loose consortium provide independent assessment of the production of new equipment for a communications firm. Working on a retainer, each consultant gives both his or her diagnosis and that of at least one other colleague. The consortium has a special evaluation tool that can give quality control indications quickly.

4. *Employee Training.* Consultant provides intensive seminars in editing and report writing. Training is done over multiweek periods using interactive instruction. Consultant's contract is used. Services provided alone or in combination with a graphic artist and a production editor.
The procedure you have just gone through is a never-ending one in consulting. To have top-quality and readily usable services, you need to modify, redefine, and augment them constantly.

Second, knowing who your likely clients are is equally important to understanding the services they may need. Exhibit 4-3 describes the factors to consider when deciding which clients to target. Exhibit 4-4 gives examples of sample clients.

---

**EXHIBIT 4-1**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Public</th>
<th>Private</th>
<th>Institutional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Large</td>
<td>Medium</td>
<td>Small</td>
</tr>
<tr>
<td>Administration</td>
<td>Complex</td>
<td>Structured</td>
<td>Simple</td>
</tr>
<tr>
<td>Skills</td>
<td>Technical</td>
<td>Managerial</td>
<td>Combination</td>
</tr>
<tr>
<td>Needs</td>
<td>General</td>
<td>Specific</td>
<td>Mixed</td>
</tr>
<tr>
<td>Client size</td>
<td>Individual</td>
<td>Group</td>
<td>Intergroup</td>
</tr>
<tr>
<td>Audience</td>
<td>Minority</td>
<td>General</td>
<td></td>
</tr>
<tr>
<td>Previous Contracts with Consultants</td>
<td>None</td>
<td>1-3</td>
<td>Over 3</td>
</tr>
<tr>
<td>Location</td>
<td>Local</td>
<td>National</td>
<td>International</td>
</tr>
<tr>
<td>Cultural / Language Differences</td>
<td>None</td>
<td>None</td>
<td>Many</td>
</tr>
<tr>
<td>Initial Contact</td>
<td>Personal</td>
<td>Referral</td>
<td>New</td>
</tr>
</tbody>
</table>

---

**EXHIBIT 4-4**

Client Examples *

1. **Organization Development.** Client is office of consumer assistance for a federal agency. Consultant is called in by director to prepare a report demonstrating more effective management practices. The agency director and his assistants review the report and are in charge of implementing its findings. The client had never used a consultant before, but decided to at the suggestion of a colleague in an equivalent position elsewhere in the agency.

2. **Executive Recruitment.** Clients are small health maintenance organizations. The consultant works with the board of governors to find the right chief executive officer (CEO). One client never used this service before, since its former CEO was the founder of the firm.

3. **Quality Control.** Clients are project managers in new product development of large, multinational corporations. The needs are multiple—a fast, credible design for quality control, which must then be presented to technical management and staff in Japan, Brazil, and Egypt, where production facilities are located. Most project managers have used outside consulting before.

4. **Employee Training.** Clients are lower- to middle-level managers of computer consultant firms. Consultant provides technical and managerial services. Most firms have used consulting assistance before.

---

* In parallel to the examples of Exhibit 4-2.

---

**Sample Task II**

Study Exhibit 4-3 and write down a short yet detailed description of your potential clients. Now ask yourself:

- Are these the kinds of clients I want to serve? Why?
- Are my clients likely to have little in common or much in common?
- How timely are the services being offered to these clients?

This exercise will give you a clearer idea of when and how your services can be used. The
simplest service to sell is the one that the client wants to buy.

**Sample Task III**

On a single page, list the services you wish to sell, to whom you want to sell them, and what your qualifications are for doing so.

Show this page to a colleague and ask the person to comment, to be a “devil’s advocate.” Make notes.

Now, in two sentences, define your marketing method.

Once you have defined your services and your potential clients, you are ready to market, market, market. Yet there is one important factor that, if left unsaid, would keep services from reaching clients. That factor is you. Exhibit 4-5 lists some primary questions you need to ask yourself to build a successful marketing method. The answers to Exhibit 4-5, plus the previous characterizations of Exhibits 4-1 through 4-4, give you the tools needed for constructing a marketing method. Next, Exhibit 4-6 addresses how a need for a service is fulfilled, outlining the desire to satisfy the client need and the consultant’s limitations in doing so. As we discussed in Chapter Three, the amount of time spent obtaining the first income is in direct proportion to the initial investment of consultant time and resources. Second, your marketing method’s success is based on how many qualified leads you can make in the time allotted and the capture ratio (percent of contracts won to new clients).

What do you use to carry out a marketing method? The answer is the brochure. This tool is the bridge between goal setting and goal realization. It is your calling card, the way to get to see clients. The brochure also gives you credibility and effectively establishes rapport with a client. In addition, the design and use of a brochure gives you experience handling advertising and promotion (discussed further in Chapter Seven).

---

**EXHIBIT 4-5**

Consultant Characterization

**Skills**
- What abilities do you have for consulting in general?
- What are your capabilities for doing the specific consulting noted?

**Experience**
- What has been your exposure to consulting?
- Describe briefly the types of consulting activities you have been involved in (including both successes and failures).

**Motivation**
- Why do you want to go into consulting?
- What do you hope to gain? What could you lose?

**Comparison**
- How are you and your potential clients alike? Not alike?
- How are you and your "rival" consultants alike?
- What can you do to gain a competitive edge?

**Devotion**
- How much time are you willing to put in initially to market clients?
- How many clients are you willing to see?
- How long will you give yourself to secure a contract?

Outcome: Briefly summarize your attitude toward marketing.

---

**EXHIBIT 4-6**

Sample Marketing Method

1. **Perceived Need.** Assistance in the formation of professional associations.
2. **Rationale.** New groups are forming associations, and existing organizations are reorganizing. But few, if any, executives possess experience in forming and operating associations. Also, the costs of managing an association are rising.
3. **Target Clientele.** Associations that are less than one year old, or associations about to form.
4. **Information Sources**
   - Business sections of daily newspapers in "association" cities (Washington, D.C., Chicago, and New York; and secondarily,
How do you design a brochure? There are no set steps. But there are some design and editorial guidelines that you should follow:

1. **Focus on a central message.** For example, I understand your concern, I can alleviate your difficulties to your satisfaction, and my services are competent, competitive, and guaranteed.

2. **Keep the text short and simple.** Use definite, specific, and jargon-free language. Use the active voice, keeping your sentences brief.

3. **List your credentials.** In terse language, state only your abilities and results relevant to the client audience.

4. **Describe your previous experience.** Again, relate this information to your audience. Lack of experience does not hinder marketing. State the range of assistance offered.

5. **Convey your operating philosophy.** Describe your methods of practice, fee determination, ethics, and other relevant factors.

6. **Use strong graphics.** Your type should be easy to read. Front and back covers should be eye-catching. Study other brochures to help you decide on using a logo, graphic displays, horizontal or vertical format, and so on.

7. **Test the brochure.** Circulate the draft to colleagues and friends. Ask the readers if they understand what the service is, why it is being offered, who can use it, and under what conditions. Now, ask yourself: How well does the brochure reflect the image I wish to portray?

8. **Edit, rewrite, prepare final copy, and print.** Your first brochure is your first attempt-with more to come as the business evolves.
EXHIBIT 4-7
Beginning Brochure

(Front cover) (Back cover)

New Associations –
Can We Take the Risk?
In the last ten years, the number of associations has doubled. Yet the support services for management has declined. Associations are the lifeblood of professional development, the heartbeat of congressional lobbying, and the watchdog of successful and profitable operations for member organizations.

To enable these functions to occur amid a changing economic, regulatory, and professional environment, effective and responsive management is needed. Our services are specifically oriented to those groups of professionals who wish to form new associations without initial management kinks and inefficiencies.

We offer custom-tailored services to design and implement startup systems for smooth and effective association management.

For further information about this singular opportunity, please contact:
Susan Duit
(312) 822-2777: day
(312) 862-1257: night

or write
Assoc. Form, Inc.
1616 Professional Blvd. Evanston, IL 60200

EXHIBIT 4-7 (continued)

(Inside, First page) (Inside, Second page)

Service Program
Our goals are to foster the following institutional abilities:
• To start up a new association in a timely and cost-effective manner.
• To build contacts in expanding membership
• To create liaisons with other professional associations
• To install public relations, publicity, accounting, education, and convention programs
• To plan for the long-term health of the association

Service Package
The achievement of these goals requires nothing short of a comprehensive, yet economical effort to launch new organizations. Such a plan would include:
• Organization feasibility study
• Custom formation plan for the new association
• Startup and organization scheme
• Cost-effective management options
• Office planning
• Membership campaign strategies
• Bridge building with other associations
• Staffing and financial control techniques
• First-quarter review and critique
• Subsequent monitoring and evaluation
Exhibit 4-7 is an example of a brochure used for an initial, business-capturing endeavor. The language is concise and pointed. The copy includes a lead-in, a message, and details on how to contact the consultant. Exhibit 4-8, an advanced brochure, contains these features plus brief statements about the consultant's experience, former clients, and operating philosophy.

When you are not there to represent yourself, your brochure will do the job. It will be read and distributed. And as shown below and in Chapter Seven, the brochure is the cornerstone of an effective marketing, advertising, and promotional campaign. Create it wisely.

- **Sample Task IV**

Develop a brochure for a consulting service that you have little intention of pursuing. Set it aside for a few days and then come back and critique it.

What insights have you learned that can assist you in preparing a professional brochure?

---

**EXHIBIT 4-8**  
Advanced Brochure

**(Front cover)**

**AFI**

Association Management: Help or Hindrance?

Today there are more associations than ever before. Similarly, there is a greater need for effective management and liaison. Operating costs are going up, competing activities are on the rise, and the complexity of doing business increases each day.

In this milieu comes a fresh look. Assoc. Form is here to alleviate management deficiencies, stimulate association liaison, and enhance organizational activities and involvement. For beginning or existing associations, our services could be the leg-up needed for survival.

We offer custom services, carefully tailored and accurately implemented to significantly improve the internal and external management of associations.

---

**(Back cover)**

To discover how you can make these significant improvements, please contact:

Susan Dult  
c/o Assoc. Form, Inc.  
1616 Professional Blvd. Evanston, IL 60200

or call toll-free:

(800)999-3344
EXHIBIT 4-8 (continued)

Service Capability
As an outside resource, we bring state-of-the-art techniques and experience to the association executive. Our program includes, but is not limited to:

- Concept study
- Organization plan
- Communications package
- On-site startup
- Unique publicity and membership campaign
- Cost control techniques
- Self-review marketing and critique

Your needs are treated individually and completely. Prior experience with more than a dozen contacts shows that timely interaction produces results that work.

Prior Experience
Management advice and assistance has recently been given to:

- National Association of Retired Persons
- State Council of Governments
- Institute for American Universities
- National Child Day Care Association
- Society for Neuroscience

Operating Philosophy
We practice in the highest ethical manner, not working for two competing clients, or transferring information without client consent. As a certified member of the Consulting Professional Association, we uphold its practice standards. References are available on request. Our major concern is the timely transfer of programs. Thus we work on a time-and-materials basis (either your contract or ours).

The consulting services we give are guaranteed to provide insight and effective change. Our challenge is working with you to implement these improvements.

Gaining client entry
You have now identified the services you wish to offer the general client community to receive them, and your strategy for marketing them; also, you have prepared your primary marketing tool—the brochure. It appears that you are ready to “walk into a client's office and make a sale.” Right? Of course, right!

But hold on. Whom do you contact? How do you reach them? How do you set up an appointment? What will you say? Why will the prospective client listen to you? How will you make the sale? To gain the client's attention, you need to remember that most clients distrust consultants; mistrust their services; don't know how to use consulting services effectively; won't let outsiders examine their activities; or fail to realize that they have a problem. Therefore, any answers you get must be directed at overcoming the client's resistance to your presence.

There are three ways to contact clients—a cold-call, a referral, or a personal contact. All three work. All produce results. Prior associates, colleagues, or clients serve as the most likely pool from which new business can arise. Referrals by
colleagues or personal friends are an excellent means of entry provided that your contact introduces you effectively. The cold-call is the most difficult way to contact a client. After garnering names from listing services, directories, associations, conference attendance sheets, and so forth, specific client names are extracted depending on the prospect's business and geographic location. The method(s) you try initially will depend on your experience, old contacts, and ability to make new contacts. The less difficult it is to meet and talk with someone, the sooner direct marketing can occur. (Additional ways to make client contact are described in Chapter Seven.)

The January 1979 issue of the Howard L. Shenson Report, a business periodical for the independent consultant, describes a fascinating ploy to attract old colleagues to your new business. Shenson suggests that the new consultant select close professional associates from different firms and tell them about his or her move to consulting. Next, ask to have lunch with each associate to find out his or her opinion of the opportunities and limitations in the respective vocational areas. After listening to your “experts,” you will be better equipped to offer services that fulfill their needs.

Alternatively, for previous acquaintances who are prospects, an informal gathering could be arranged to present your services. This demonstration can occur through a professional association, at a convention, or as a special marketing activity. In both cases, the prospective clients are trustworthy and in potential need of your services. Let's now see how you make one-on-one marketing happen.

**Personal associate.** Using either the “warm-up” technique described above, a phone call, or a visit, make an appointment to discuss the client's concerns and your services. Be polite, straightforward, sincere, and open.

An example of an appointment call is given in Exhibit 4-9. This conversation illustrates the informal, direct, and considerate demeanor that establishes a positive rapport with the would-be client. Let your prospect decide on the date of the meeting and the time. Finally, no two appointment conversations have exactly the same content.

**Referral.** Here the consultant uses a third party, a person who usually knows both parties, to expedite a meeting. The two of you should decide what communication mode—letter, telephone, or visit—will enhance your chances to meet with the prospect.

For example, assume that your mutual contact says that she has spoken to the would-be client and that he will be in his office Thursday afternoon. Come Thursday, you decide to pay him an initial visit. Exhibit 4-10 shows you what could transpire. Here the tone is formal. With either response, you should state your intention to follow up with a phone call. The third party's assistance has enabled you to explain your services briefly, setting the stage for subsequent discussions.
EXHIBIT 4-9
Phone Call to Arrange for Appointment with Prospect

**Consultant:** Larry? This is Steve. Do you have a moment, or have I caught you at a bad time?

**Prospect:** Yes, what's on your mind?

**Consultant:** I have recently started my own consulting practice, as I mentioned to you not long ago. My practice is primarily education and training. The type of programs I'm involved with include training consultants to further their consulting activities. My programs are not "canned"; each training event is oriented toward a specific situation and requirements. My purpose in speaking with you is to arrange a meeting to explore your needs. Also, at that time, we could discuss how my services could best serve your organization. This exchange should not take more than a few minutes. How does this sound to you?

**Prospect:** It sounds okay, Steve, but I'd like to have some senior people sit in with me.

**Consultant:** Certainly, let's try to see each other next Thursday at 4:00 p.m. or next Friday at 9:00 a.m. Which would be better for you?

**Prospect:** Hmm, I'm busy at both those times, but free for lunch Friday. What do you say?

**Consultant:** That's fine. Look forward to seeing you, Larry, and thank you.

EXHIBIT 4-10
Introductory Call on the Client

**Consultant:** My name is Peter Reliance, and I would like to speak with Mr. Jones (prospective client).

**Secretary:** Please state your purpose.

**Consultant:** I am here to pay a visit to Mr. Jones.

**Secretary:** Just a moment, I will ring Mr. Jones. You may go in now.

**Consultant:** I am Peter Reliance, an independent consultant. I know you are extremely busy, but I wanted to stop by and meet you. Recently, I met a mutual colleague of ours, Ms. Gobet, at a seminar on government use of consultants. She spoke to me about your activities, and I appreciate her assistance in arranging this introduction. Briefly, I work in consulting training and development, primarily with government clients. I'd like to give you a call in the next few days to arrange a mutually agreeable time for further discussions. In this way I can explain to you what I do and why.

**Mr. Jones:** Ms. Gobet is a close friend, and, yes, I would like to take the time to learn more about your services. Could you please call me at the end of next week to arrange a mutually agreeable appointment time?

**Consultant:** Fine. I'll be happy to speak with you then.

**Secretary:** Mr. Jones is busy and can't see you now. Could you leave your name and a number where he can contact you?

**Consultant:** Thank you. Here is my card. I will be in touch with Mr. Jones in a few days to arrange for an appointment.
EXHIBIT 4-11
Phone Conversation for a Cold-Call

| Consultant: | Good morning, may I please speak to Mr. Progdev? |
| Secretary:  | Mr. Progdev is on the other line. Do you wish to hold? |
| Consultant: | Yes, please tell him my name is Jack Cando. I am an independent consultant here in Washington, D.C. |
| Prospect:   | Hello, this is Jules Progdev. |
| Consultant: | Good morning, this is Jack Cando. I am calling you this morning based on an initial discussion with Helen Trainwell in your management development branch. I am an independent consultant specializing in the training area. |
| Prospect:   | How can we help, Mr. Cando? |
| Consultant: | For the last two years, I have been involved in training government clients in how to use consulting resources more effectively. The workshops I put together give the participants a unique opportunity to strengthen their communication and administration skills in dealing with consultants. In your agency, there is enough contracting to warrant consideration of this training activity. I have prepared a packet of materials that details the services offered, and, if you like, I would be pleased to send you a copy. |
| Prospect:   | I am intrigued by what you have said and would like to take a close look at your information. Do send me two packets, as my colleague, Joan Skillup in administration, would also be interested in your training. |
| Consultant: | Fine. I'll put the training information in the mail by this evening. Then, I'll phone back in two weeks to ensure that the mails work and to see what the next step should be. |
| Prospect:   | That's fine. Thank you for your time, and I look forward to receiving your materials. |

**Cold-call.** This means of introduction is the riskiest, but also unavoidable—so enjoy it! No matter how you obtained the contact’s name, call first to verify that he or she is still performing the same duties. Also, tell the person who you are, what you do, and why he or she is a plausible candidate for your services. In this first conversation tell the person how you found his or her name. For instance, “I am calling based on a paper you presented at such-and-such conference” Or “I saw your name in a newsletter of such-and-such organization. We are both charter members.” Or “Your name came across my desk as one of a select group of training directors. My interest and services are also in this realm”. Then offer to send the prospective client your brochure, a covering letter, and any other relevant information. Keep the phone conversation short and direct (see Exhibit 4-11) and try to arrange a follow-up discussion and possible meeting. This is conveyed again in the covering letter of Exhibit 4-12.* The letter can also be used as an initial communication device. Your first sentence might read: “Have you considered that the current market for federal consulting services may actually be in an underutilized state?” Enclose your business card or a brochure with your full name, address, and phone number. After sending a letter, call the client prospect until you both agree on a suitable time for an initial meeting, or determine that your services are not required. You will probably have to make several calls.

*Further discussion on marketing of federal clients is given in Chapter Ten.
EXHIBIT 4-12
Follow-up Letter to Initial Client Phone Call

Consultant Letterhead

Date

Mr. Jules Progdev, Head
Productivity Improvement Branch
888 Constitution Avenue, N.W.
Federal Agency PQR
Washington, DC 20076

Dear Mr. Progdev:

It was a pleasure to speak with you about consulting training. As your colleague, Jan Burcrat, recently remarked at a seminar on “Government’s Need for Support Contractors,” the federal market may expand rapidly in the future, although procurement controls could tighten. To meet the needs of a stricter, competitive market, higher quality is required. Quality means both people and their services. Raising productivity can be done through multiple means; one of these is training.

From the accompanying brochure and needs analysis, a workshop can be constructed on how federal program officials can better utilize the services of consultants. This tailor-made course can either augment an existing training component or form a new learning segment. Further, the learning segments can be either one- or two-day seminars, three- or four-week short courses, or a combination, depending on the preference of your office or the various departmental areas you serve. Participation is a key communication technique through exercises, question-and-answer periods, and diagnostic sessions about current problems and concerns.

This is not to say that such training can be all things to all people. It cannot. Instead, the learning experience can provide better bridges between program officials and contracting officers, as well as program officials and consultants, so that program mandates can be executed more effectively. To demonstrate this principle, an example of a training workshop is enclosed.

I look forward to your response to this letter and training material once immediate administrative concerns are resolved.

Sincerely,

Jack Cando
Independent Consultant

Perseverance and flexibility are important, but so are patience and politeness in reminding the prospect of your interest in offering consulting services.

- **Sample Task V**

Closely monitor your next prospect to see how you make initial contact and the tools you use to arrange a meeting. Could you have changed the order of methods used? Take notes during your phone calls; how could they be improved? What is your initial impression of the prospect? What are your reservations and motivations for making a sale?

The methods we have discussed are predicated on the consultant taking and sustaining the initiative toward arranging a client meeting. As your reputation grows, the demand for your services will increase and potential clients will request your services. It is a proud moment when this happens, but do not expect it. If it occurs, tell the client about your services, your background, and how you think the services will, in general, enhance the client’s organization. More specific information will be given during the client/consultant assessment of your services (described further in the following pages).

Steven C. Stryker

Atracting the potential client.doc/ 12
The exhibits depicted here describe positive outcomes. Two additional comments are in order. If the client says, “Thank you, but no thank you,” then you politely say that you hope your services can be of use in the future. Second, if after sufficient communication, the would-be client is either undecided or wishes to postpone any further discussion, the consultant can cease marketing until a more conducive time. In closing the conversation with the client, attempt to discover when that time is.

In addition, no matter what the outcome of the entry phase, keep records. Marketing information can be kept in a three by five-inch file box. For each prospect, fill out a separate card, as in Exhibit 4-13. Keep a record of the dates at which various actions occur. It is a good idea periodically to collate all leads, prospects, and contracts in a review sheet. Such a sheet (shown in Exhibit 4-14) can be used to determine the benchmarks of your marketing method, as well as the accounting, which will be addressed in depth in Chapter Eight.

### EXHIBIT 4-13
Sample Card for a Prospect

<table>
<thead>
<tr>
<th>Name ___________________</th>
<th>Manner contact made ________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number _________</td>
<td>Name of client organization ________________ Adress ________________</td>
</tr>
<tr>
<td>To be contacted ________________</td>
<td>Letter sent ________________ Phone call ________________</td>
</tr>
<tr>
<td>Visit ________________</td>
<td>Other ________________ Appointment ________________</td>
</tr>
<tr>
<td>Appointment outcome ________________</td>
<td>Potential contract amount ________________</td>
</tr>
<tr>
<td>Current status ________________</td>
<td>Comments and impressions ________________</td>
</tr>
</tbody>
</table>

### EXHIBIT 4-14
Marketing at a Glance

<table>
<thead>
<tr>
<th>Date _____________</th>
<th>Leads</th>
<th>Date</th>
<th>Prospects</th>
<th>Status/Date</th>
<th>Contracts</th>
<th>Amount</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Leads</td>
<td>Total Prospects</td>
<td>Potential Contract Value</td>
<td>Total Contracts</td>
<td>Project Value</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benchmark</td>
<td>Actual Achievement</td>
<td>Differences</td>
<td>Comments</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td>2.</td>
<td>3.</td>
<td>4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Case Example 4-1: The Story Teller

John, a colleague of mine, has a distinctive entry style with a prospective client. He usually acquires one or two facts about the client's situation, then says to the client something like: “Your situation reminds me precisely of another consulting assignment I once did. It just So happens that the client also was experiencing these troubles and needed my expertise to get out of a jam. Here's what happened...” John then finishes weaving his yarn of enticement to the client. No, the consultant is not broke; on the contrary, he has a thriving business.

I asked if he ever came across poorly to certain kinds of people. The answer given was: “Well-uh, yes, women especially and young managers seem to be unimpressed. If anything, they think I'm wasting their time.” “Then what do you do?” I asked. His reply was expected: “I usually save an exploit for the end, just to leave a provocative impression with them.” The upshot, though, is that this person told more stories than sold contracts—many more.

Meeting with the client for the first time

The purpose of the first meeting is to define the prospect's interest, to discuss the consultant's procedure and resources in dealing with this interest, and to establish a working relationship. These objectives are realized concurrently. Thus you need to be prepared to address and respond to the entire situation. Three elements influence your performance: (1) appearance, (2) presentation, and (3) interaction.

Appearance. In your first encounter with a prospect, you gain an initial impression and make one. A primary element is appearance. Some consultants use appearance as their calling card by wearing loud colors, dark glasses, or coming in "wind blown." The rationale is easy—the flashy consultant figures that the would-be client will remember his or her unique dress style. It is true. But will potential clients remember this consultant in a positive light? Probably not. To create a relaxed atmosphere at the first meeting, you should wear conventional, well-fitting clothes, be neat, and be yourself, emphasizing the positive aspects of your image. The importance of appearance is indirectly proportional to the number of interactions with a client. The longer the consultant knows the client, works with the client, and feels comfortable with him or her, the less influence appearance plays in the outcome of the meeting.

Presentation. Although no two first sessions are the same, there is a four-part procedure to “sell the client,” which has proven to be successful. It consists of something like this:

Warm-up. The consultant comes into the client's office, first expressing appreciation at having the opportunity, while noting the time constraint both parties are under. Then the consultant briefly reviews his or her background, including education, experience, areas of concentration, and former clients. A few comments on the prospective client's firm or agency are also included to show consultant interest and insight. Then the consultant asks for questions from the client and asks the client questions, if appropriate.
EXHIBIT 4-15
Needs Analysis Form

<table>
<thead>
<tr>
<th>Client name</th>
<th>Date</th>
<th>Firm or agency name</th>
<th>Phone number:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of employees</td>
<td></td>
<td>Firm address</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focus issue</td>
<td>Basic purpose or product</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brief description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior efforts to handle problem</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client's current objectives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous use of consultants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current perspective on consultants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consultant's initial evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consulting services of use here</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advantages of services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disadvantages of services</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Overview.** Having established a “climate,” the consultant now presents the essence of his or her services. There are as many ways to do this as there are marketing guides. However, one means that has proven effective is the preparation of a Needs Analysis. After explaining the basic services, the consultant suggests preparing a Needs Analysis to discover whether these services fit the client's situation. Exhibit 4-15, an example of such a Needs Analysis, is used to gather basic data about the client and the organization. The consultant explains the content of the Needs Analysis form and what results are expected from its completion— that is, a better understanding of the real issues requiring assistance.

**Issue clarification.** The Needs Analysis form is filled out jointly by consultant and client. Using Exhibit 4-15, the object is to uncover the client's concerns and how, if at all, the consultant can be of assistance. A Needs Analysis should be completed whether the client has sought out the consultant or vice versa. But do not gather the information for this form at the expense of your relationship with the client. To sustain your rapport, restate client perspectives, interject supportive comments, and be nonjudgmental through-
out. The object is to reach an understanding of whether you can work with the prospective client. To do so, communicate simply, directly, and succinctly. Simple, clear English is a powerful tool. You need not complicate things with obtuse, jargon-laden language. Also, listen to what the client is saying, distinguish between what the real issue is as opposed to what the client perceives it to be. Give the client ample time to talk without cutting the person off. Repeat major points that were discussed. The feedback assures the client that you have heard what he or she has been saying.

**Closure.** At the close of the meeting, leave a copy of the Needs Analysis with the potential client. The prospect can study it, consider the relative costs and benefits of the proposed consulting services, relate such services to other concerns, and then let you know his or her decision. The bottom line is whether the prospect thinks that your services are required now and what form they will take. Further, there are ways to improve communication and keep the conversation going. For example:

- If the client is accepting, attempt to move the conversation toward discussing a contractual relationship.
- If the client is skeptical, take a different track and show that this skepticism is a permissible and expected stance.
- If the client is hostile, liven up the dialogue with a joke, and move on to demonstrating the advantages of your services.
- If the hostility persists or the client is bored, point this out and suggest an alternative day and time for continued discussions.

**Sample Task VI**

Plan a marketing meeting. Set down the topics to be covered, the tools employed, the communication skills available, and the characteristics/ impressions of the would-be client. Find a colleague or friend. Have this person play the client, and you be the consultant. Role-play the first meeting. Then critique each other's performance. What have you learned about becoming more sensitive to the communication aspect of marketing?

After your initial meeting, write a succinct letter of thanks, reiterating your desire to offer assistance. Later, call the client to learn his or her decision on your offer. If need be, set up another short meeting to refine your efforts. Make any supportive comments, such as citing examples inside or outside the client's organization where such services are being used, past successes or service use, pertinent shortcomings, and how these services will fit into the organization's operations, objectives, or management development.

In the next chapter, competitive contracting is discussed. The principles articulated there are an extension of what has been said herein. Win, lose, or draw, you should conduct a debriefing to determine the strengths and weaknesses of your marketing effort. This can be accomplished by merely jotting down notes, filling out a form, or completing a formal, written assessment. The purpose is to find out your problem areas— for example, information gaps, rapport, state of client organizations, mismatch of services with organizational needs, and so on. Also note the positive points of the encounter. This information serves as valuable knowledge for future, more successful marketing efforts.

**Special topic: turning down a consulting opportunity**

For a beginner, the thought of saying “no” to a client seems contradictory. However, on closer inspection, we find a healthy rationale for refusing consulting work. Every assignment you do contributes to your reputation. Thus, any consulting activity—particularly an initial engagement—that could harm you should be avoided.
There are no hard-and-fast indicators, but there are some signals to look for:

*Personality clash.* Consultant and client chemistry may not be conducive to forming a working relationship. Try to improve the interaction by talking about it. If this does not work, suggest an alternative consultant.

*Scope of work.* If the effort outlined by the client is too large, complex, costly, and/or unrealistically scheduled, consultant and client can attempt to renegotiate the assignment terms without fundamentally changing the objectives or benefits of the consultation. If this is only partially effective, the consultant can specify other support persons to assist with the effort. If, together, these measures do not allow the consultant to do a high-quality job, an alternative consultant could be mentioned to the client.

*Working style.* The assignment may call for the consultant to behave and to perform in ways that would compromise his or her independence, objectivity, and integrity. Corrective measures (as above) could include redefining the scope of the work and the consultant/client relationship. If both are not possible, the consultant should seriously consider declining the offer.

*Conflict of interest.* In the same vein as above, measures are taken to eliminate such conflict. If they prove to be unsuccessful, the consultant should refuse the assignment.

*Financial stability.* If, for any reason, the financial status of the client organization appears shaky, the consultant should thoroughly examine the client's ability to pay before signing a contract. If such an examination was denied or any subsequent pertinent information withheld, there would be grounds for rejecting the assignment.

You will probably not encounter these situations every day. But since you want to provide high-quality services at a reasonable rate, any obstacles should be immediately resolved before committing yourself. Use discretion in handling these matters, but also seek competent advice as need be.

**Case Example 4-2: To Turn Back, Turn Down?**

The instance described below is not peculiar to one firm. I know of several private firms that have an annual budget cycle for procuring goods and services. These firms go out to bid in October and award contracts by February 1 for the entire calendar year.

Company BCE issued solicitations for various technical support, including project analyses, computer assistance, and training. I submitted a response to the training services request during the budget cycle. In January, I was asked to come in for negotiations. Having received word that I passed, I concluded that the next step was the award. How wrong I was! Five months passed before the award was made. BCE offered me 30 percent less than I negotiated for and truncated three tasks. Two days later I received additional instructions asking if I would substitute two remaining tasks for two others.

Five months late, thousands of dollars less than my initial offer, and a new scope of work. Were these grounds for rejecting the consulting assignment? I went to negotiate a final contract only to discover that the firm's procurement procedure had changed. I could only do the work one task at a time on separate accounting vouchers. The handwriting was on the wall. I sent them a polite note that kept the door open—but only to better experiences.

**Summary and extension**

This chapter has looked closely at marketing, a subject that often receives cursory treatment.
Often, initial efforts to meet with a prospective client are assumed to occur as a matter of course driven by the desire for initial contracts. Or if the lack of knowledge or motivation about selling an intangible service assumes that someone else will make the contacts. In either case, the consultant passes the buck. Understanding how to overcome your resistance and do your own marketing can give you insight into how to work through the client's resistance to using your services. So, here a step-by-step approach is presented, starting with the development of a marketing method and ending with the client's decision whether to ask for a proposal. Exhibits shed light on such glossed-over areas as the ways a brochure changes, how a consultant gets to see a prospective client, and how to make the first meeting a successful one. The next chapter is fundamental to the consulting assignment because without a secure and reasonable contract, no services can be given. We have laid the groundwork for that stage in trying to ensure a mutually satisfying and beneficial consulting experience.

**Notes**

**NOTA IMPORTANTE**
Este material de lectura es de uso exclusivamente académico, por lo que su reproducción requiere del permiso expreso de sus autores. Si encuentras cualquier error u omisión en el documento, te agradeceremos nos lo comuniques enviando un correo electrónico a: jpariente@uat.edu.mx
Dirección General de Innovación Tecnológica (INNOVA) de la Universidad Autónoma de Tamaulipas. Última revisión: agosto de 2003.