



From  
**Anonymous**  
to  
*Advocate*

# Intro.

## *To close a client is a great accomplishment,*

but every close should be leveraged to create a long-term relationship. To build a fulfilling career in sales, always remember the long-term benefits that come with solid relationships. This e-book will analyze valuable tips for not only moving prospects through your funnel, but also turning them into life-long advocates for your business.

## *An advocate is an unpaid representative.*

They sing your praises and provide the most valuable marketing imaginable—trusted referrals. When you work with someone who has been referred, the process is built on a foundation of trust from day one. Most of the acquisition process is already done for you. The person referred already has faith in your abilities.

This e-book details every step of taking a person from anonymous to advocate.

2/  
pg Plucking people  
from anonymity

7/  
pg Working with  
prospects

9/  
pg Serving  
your clients

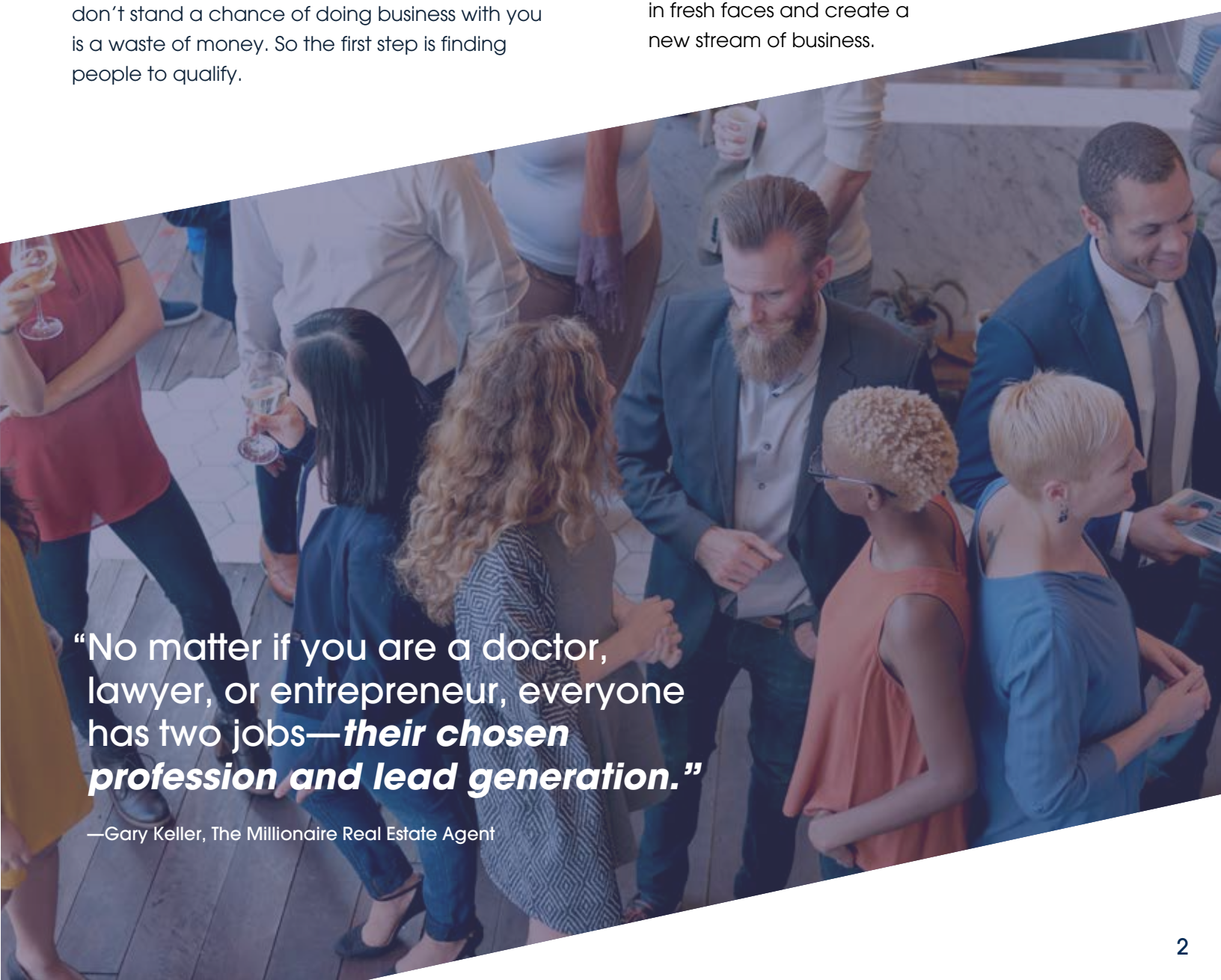
12/  
pg Creating advocates  
of past clients

# *Plucking People from Anonymity*

*The majority of the world's population is not in your sales funnel*, and rightfully so. Depending on the what, where, and how of your career, you're going to have to qualify the people you interact with. You want to come to a quick conclusion about whether or not someone should enter your funnel. Spending time on people who don't stand a chance of doing business with you is a waste of money. So the first step is finding people to qualify.

## **Networking**

You should be networking during every waking hour, because every person you interact with throughout the day is a potential lead. First, we'll focus on places you can meet people outside of your normal activities as a salesperson. This allows you to bring in fresh faces and create a new stream of business.

A photograph showing a group of people in professional attire networking at a social event. A man with a beard and a woman with long curly hair are in the center, talking. Other people are visible in the background, some holding drinks. The scene is dimly lit, suggesting an evening event.

**“No matter if you are a doctor, lawyer, or entrepreneur, everyone has two jobs—*their chosen profession and lead generation.*”**

—Gary Keller, The Millionaire Real Estate Agent

## *A few places you should network are:*

### ► **Meetup.com**

*Meetup.com* is a wonderful resource for finding like-minded people who can enter your funnel. If you go to the right kind of meeting, then you can sharpen your professional skills. There are meetings on Meetup for just about anything. You can find gatherings on hobbies, as well as professional groups that act as great referral networks.

You can also start your own meeting. Challenge yourself to create one for other sales professionals where you can trade knowledge, build camaraderie, and network. If the idea of rubbing elbows with your competition doesn't strike your fancy, then start a Meetup for prospective clients. Every person who walks through the door will be a hot prospect.

### ► **Volunteering**

This is a great way to get involved in your community and have prospects as a secondary perk. When you are volunteering, you tend to cross paths with the movers and shakers in the community. Most charitable organizations exist thanks to donations from prominent people. By putting in time at an organization that is near and dear to their heart, you get the relationship started off on the right foot. Connecting over common values can create a lasting partnership that goes far beyond business.

### ► **Social Media**

In the modern world, you don't actually need to be physically present to network with someone. It's not enough to simply send a friend request—you actually have to *be social* on social media. Start dialogues and get the ball rolling. When you do meet in person, you will already have built a strong rapport.

Join the groups where your prospects spend time. Never incessantly market yourself, and only mention your profession when there is an organic reason. Always focus on others.

### ► **Seminars, Classes, and Conferences**

Find events and talks within two hours of where you live, and attend as many as your schedule will allow. These functions often attract a high tier of professional and provide you with the opportunity to get in the room with some serious influencers. Even if one doesn't pan out to be a great networking opportunity, you will still learn valuable information about your industry.



# The importance placed on *networking* can seem a bit *overwhelming*.

The reason it has the tendency to leave a bad taste in your mouth is because it has become associated with phoniness. But if you want to create fulfilling and lucrative relationships, you have to operate with total sincerity. If you do, you will end up with new colleagues and friends.

A lot of people also regard networking as a negative because they treat it like an activity in and of itself. Networking shouldn't be like going to the gym; it shouldn't be a specific activity that you block out time for.

Think about networking like an added layer to everything you already do. If you make it secondary to your everyday life, then you don't have to network like a door-to-door salesman. You just have to keep doing your thing and making connections. People will be drawn in, and maybe down the line you can turn them into clients.





## *Marketing*

Another way to pluck people from anonymity and get them into your sales funnel is through the outward-facing marketing you do. ***This typically takes two forms.***

### ▶ **Direct Mail/Print**

This can be something as simple as a postcard or as in depth as a branded publication. Always make sure you have a way to measure the impact of the piece before you send it out, otherwise you'll just be gambling with your marketing dollars. Anytime direct mail goes out, you can greatly increase the effectiveness by following up with recipients.

If you send to a huge farm, and following up with every recipient just isn't realistic, then make sure the piece has a strong call to action so they can find you. If you have the ability to use a specific phone number or web page to coordinate to a specific piece of collateral, then you can easily track ROI.

Create a single landing page with a lead form on it. This way you will know that every prospect that turns into a client was acquired as a result of your direct mail campaign. This kind of tracking allows you to manage your messaging and make sure your marketing dollars are well spent.

### ▶ **Web Presence**

The buyer's journey has changed forever. Now that technology is a ubiquitous part of everyday life, prospects have access to vast quantities of information.

***Most customers complete 60% of the purchasing process before they even talk to a salesperson\****

—they do research before buying nearly everything. Salespeople might be the subject of hundreds of internet searches every month.

It goes without saying that sales professionals need to be on social media, and these days most are. They can take it one step further by creating things like Facebook ads that will actually bring in leads. They are relatively inexpensive, but at the same time, it's more important to be consistent on the platform in terms of engagement.

Salespeople can also contribute to different forums. By writing for these kinds of sites, they increase their exposure and solidify their reputation as a local expert.

Publishing to different web forums will help you expand your ever-valuable web presence.

\*The Digital Evolution in B2B Marketing (Google and CEB)



## *Here are three sites that you should contribute to at least once a month:*

Blogging is a great way to establish yourself as an industry expert. If you make a habit of writing and publishing blogs, it increases your chances of showing up in relevant web searches. The first hurdle is figuring out where to post. Below are three great places to distribute your work.

### ▶ **LinkedIn**

Everyone's favorite platform for business-related social media is also one of the best places to publish blogs. The interface is incredibly simple and your work is immediately visible in the newsfeeds of your most important connections.

### ▶ **Quora**

This platform is not made for conventional blogging, instead it facilitates your ability to ask and answer questions. If other users ask questions about your industry, you can draw from your expertise to provide an insightful answer that will be available for anyone on the web to see. This is the easiest way to provide thought leadership, since many questions can be answered in only a few minutes.

### ▶ **Personal Site**

If you have your own website, then you should make a goal of blogging at least once a month. In effort to create search relevance, write blog posts that revolve around the town(s) you serve. Try to find different ways your business relates to your community.

# Working with Prospects



*Now that people are aware of the service you provide,*

they have become a prospect. These prospects are at the earliest stage of your funnel and there are a few ways you can increase the likelihood that they'll leave as clients.

## ► Remember Their Name

This might be the simplest power move in all of sales. Remembering a name makes a huge difference when you address someone. It creates a more personal tone and will fast track your ability to build rapport.

It's common sense, but it is still overlooked by most professionals. Try to implement an association system for remembering names. It's an incredible way to distinguish yourself from the masses, and if you remember someone else's name, that person will feel obligated to remember yours.

## ► Apply a Qualifier

No matter how good a salesperson you are, you're not going to be able to work with a prospect who has no need for your product or service. Come up with a tiered system that will allow you to organize your prospects.

If they aren't a current prospect, then your outreach should be quarterly, a simple effort to stay top-of-mind. Label them as C-Level.

If they are considering making a purchase, you want to carry out active marketing. Reach out regularly over the phone or in person.

If they express a direct interest, then you want to stay in close contact until you can convert them. Label them as A-Level. Reach out to them every day or every other day.

## ► Establish a Plan

Base your outreach on their qualifier. Landing clients is rarely about who has the most creative outreach. Creativity is valuable, but you need to focus on frequency and consistency. When you hammer out your approach, you need to stick with it no matter what. The only time your plan should change is if a new qualifier applies to them.



## A week in pursuit of an A-list prospect should look something like this:

- Call them at least 9 times until you get them on the phone.
- Follow up every other call with an email.
- Arrange for an interview.
- Bring American Lifestyle magazine in place of a business card.
- Use American Lifestyle magazine to highlight what differentiates you from other salespeople.

# *Serving Your Clients*

When you take a prospect on as a client, your contact with them should increase. It is your job to act as an expert guide and a trusted advocate. Never make the mistake of placing clients on the backburner once they sign.

***Clients want to be kept in the loop, and it is always better to err on the side of too much contact than too little.***

1. Manage expectations. Set the bar at the right height and make sure you can over deliver on all of your promises.
2. During your interview, you gave them a generic sales plan. Now you need to create one tailored specifically to them.
3. Set up a second face-to-face appointment where you can present the new plan.
4. Gather feedback and detailed expectations.



One of the best ways to create a great client experience is with an extremely thorough introductory interview, which should always be in person. You can find out exactly what they are looking for. You can ask probing questions early and get those pesky financial details locked down early in the game.

## Here are a few steps to keep them engaged in the process and create memorable service.

1. Instead of acting like you are solving their problems for a price, try to make it seem as though you are enabling them to solve their own problems by helping them to achieve their dreams.
2. It is easy to be dismissive when clients want to buy outside their price range. While you might have to do some soft convincing, make sure to work hard to give them exactly what they want.
3. Pick up the pieces when deals fall through. Mitigate disappointment, and bring clients closer to the light at the end of the tunnel.
4. Never apologize for the same thing twice. An apology is a spoken contract that the mistake will not be repeated.





***When it comes to communication,***

you should always try to call. If you can see clients face to face, that's even better. When their representative is only communicating through sporadic email, it lacks the personal touch that goes so far in alleviating worry.

When you have to communicate cold information where a paper trail is important, use email. For everything else, pick up the phone and follow up with email. Every prospect is different, and you need to identify their communication preferences from day one. If the client likes smoke signals, start building fires.

# *Creating Advocates of Past Clients*

**“When a past client sings your *praises*,  
it’s the *most valuable kind of marketing*.”**



## *The sale is never over.*

When the ink is dry and deal the is done, you have to make sure you’re remembered. The best way to build a fruitful career is to leverage every single satisfied past client and turn them into an advocate for your business. No advertisement or marketing campaign can beat a referral. When a past client sings your praises, it’s the most valuable kind of marketing.

## **Here are some steps to take directly after the sale:**

### **1. ASK FOR REFERRALS.**

Wait for a moment when they are feeling good. You don’t want to ask for a referral right after a deal falls through. A subtle and sincere reminder placed after a victory will create a positive association.

### **2. TAKE PHOTOS.**

This is a way you can document another happy customer. Have your phone ready before you ask for permission, and make it quick and painless.

### **3. CONNECT WITH THEM ON SOCIAL MEDIA.**

Send them a friend request or start following them while you are still working together and they’ll be much more likely to oblige. This is perfect for keeping you top of mind because when they see your content, at the very least it will help them to remember your name.

### **4. GIVE THEM A CLOSING GIFT.**

A bottle of wine is lovely, but it only lasts for a night. You want something that will keep your name in the house for years. The best gift is personalized. If you can pick up on some clues as you work with them, go for something thoughtful. If you’re hard up for ideas, then make sure you give them something branded. Instead of just a bottle of wine, also get them a branded corkscrew.

## Three ways to stay top of mind long term:

### 1. SEND AN OCCASIONAL EMAIL—EMPHASIS ON OCCASIONAL.

These kinds of communications should not just be a smash-and-grab attempt at getting people's attention and shouting your name at them. This correspondence needs to provide value. If you don't have time to compose a newsletter every month, then utilize American Lifestyle's Digital Edition. It's the most beautiful newsletter in the industry and always arrives filled with incredible content that your connections will love. It's a thoughtful way to keep your brand top of mind. Most importantly, it gives you a reason to reach out.

### 2. SET UP AN ANNUAL FACE-TO-FACE.

Set a number of past clients you want to see every week. So whether you're just stopping into their office or taking them out to lunch, precious face time is the kind of relationship builder that keeps you remembered forever.

### 3. SEND AMERICAN LIFESTYLE MAGAZINE.

This beautiful publication makes a gift of your marketing. When other pieces of direct mail get thrown in the trash, American Lifestyle magazine lands on the coffee table, where it is front and center for weeks at a time. This ensures you are remembered in the best light while providing your contacts with an item of value they actually look forward to receiving.



# Closing



These are the steps that salespeople can take to increase their business exponentially. When you turn these steps into a daily plan of action—a lens through which you analyze all your interactions—you build a book of business that will grow itself. In a world where people have an unprecedented number of options, there is no better marketing than an advocate for your business, a person who sings your praises for no other reason than the fact that you provided amazing service.

If you follow this process, every client turns into an **advocate**, and every advocate brings in **more clients**.

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