

Compliments of Paul Sanders

ISSUE 14

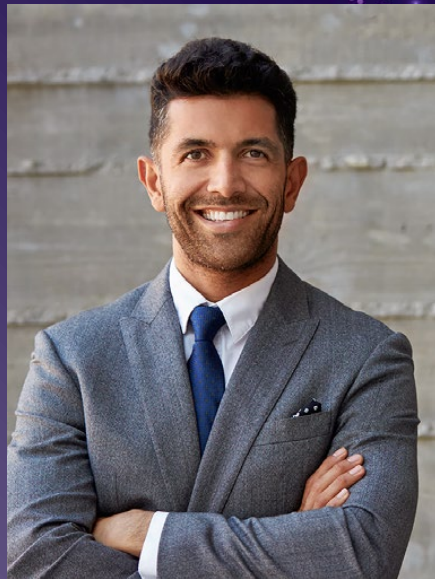
# BUSINESS

IN ACTION

## NURTURE YOUR RELATIONSHIPS

Transform your contacts into trusted partners

PG. 08



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## LEAD BY LISTENING

Adopt this powerful leadership tactic

PG. 04



## THE NEUROSCIENCE OF BUSINESS

Leadership expert **René Rodriguez** discusses amplifying your influence

PG. 28



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## Front of Tear Out Card 1



### 5 WAYS TO LEAD BY LISTENING

Active listening is an overlooked yet vital practice that can help any leader make the most of their time, earn the respect of their team, and make a great impression on clients.



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## Back of Tear Out Card 1

Follow these **five active-listening tips** to become more present, open, and engaged in any conversation.



- 1 Pay attention.** Shut down distractions such as your email inbox or cell phone to ensure the person you're communicating with is your top priority.
- 2 Withhold judgment.** Don't cut the person off to share disagreements. Hear them out until the end, then collaborate with them to come to a solution that works for both of you.
- 3 Practice mirroring.** This involves tapping into and matching a person's verbal and physical cues to make them feel more relaxed and connected with you.
- 4 Seek clarity.** Ask open-ended questions so the person can better express themselves, and feel free to request deeper explanations.
- 5 Summarize for them.** Throughout the discussion, recap important points after the speaker has explained them. Then redirect toward a central topic.



# Contents

ISSUE 14

Dear Bill and Judy,

Small business owners have always worn many hats, but these days, the one of chief marketer has become especially important. This issue of Business in Action offers a variety of ideas for how you can make a bigger impact with your advertising efforts, including a guide to segmenting your email list, a look at the untapped potential of pet marketing, and a how-to for making your business shine on video.

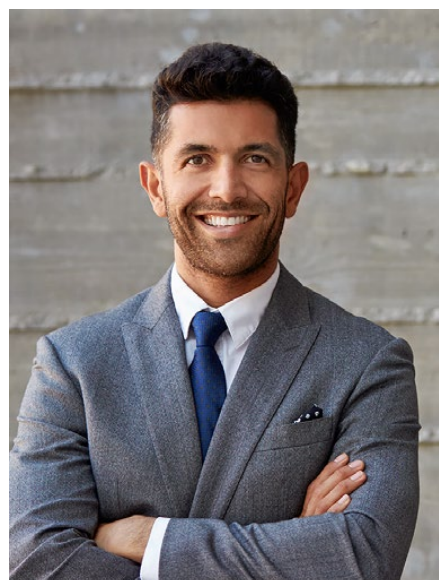
You may already have an email list of clients and prospects, but that's only part of the equation; it's how you use the info that matters most. In this issue, you'll learn how to categorize your email list so you can target your messaging to the right people at just the right time.

The pet-care market was valued at \$246 billion in 2023, so it's no secret how fond we are of our four-legged friends. Putting pets front and center in your marketing can help your message strike a chord and draw more eyes to your business. Find out how inside.

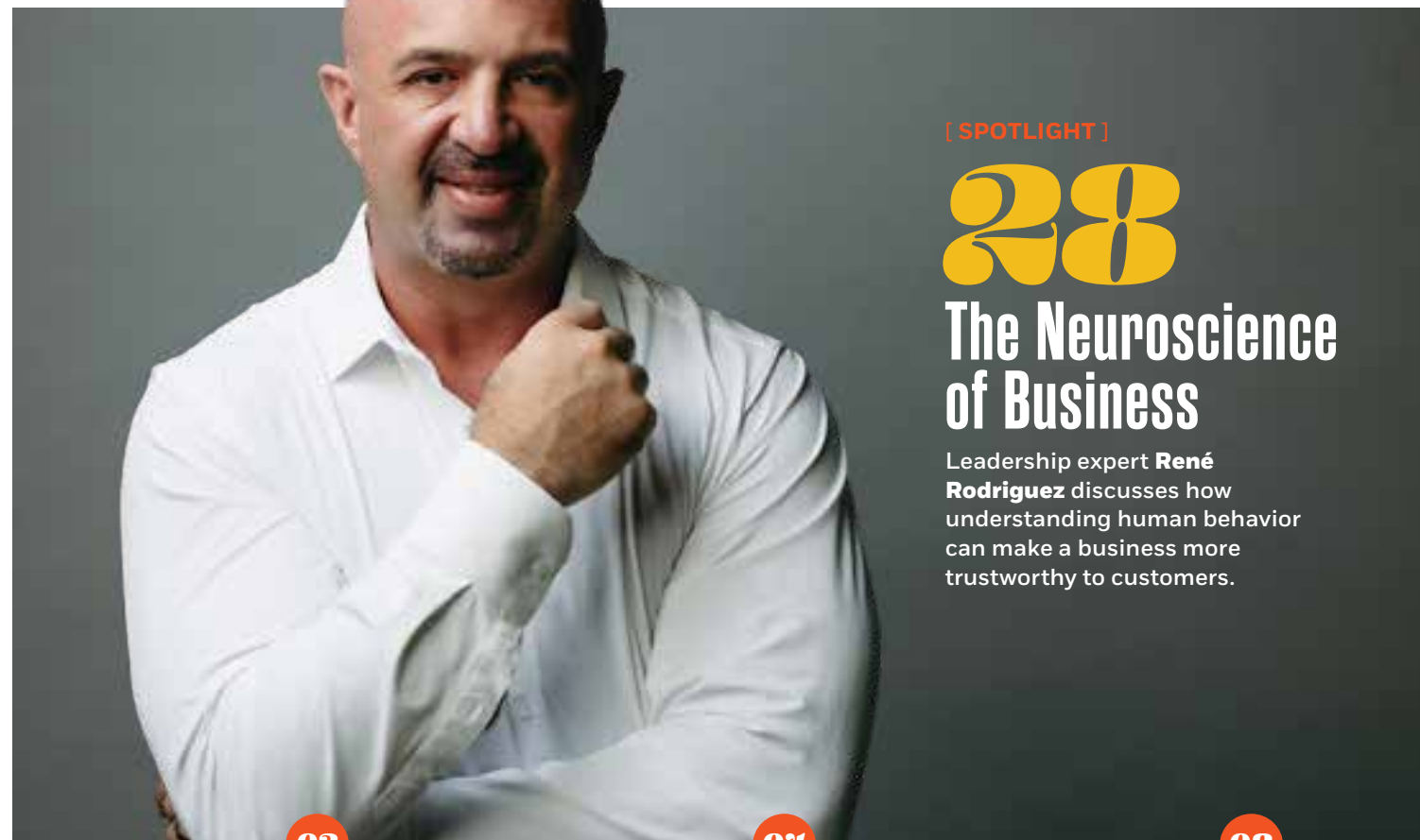
Video is king today, but with digital platforms changing so rapidly, it can be challenging to keep up with various trends. Be sure to take a look at the enclosed tips for making your video marketing stand out in a sea of other marketing content.

May all your marketing efforts prove successful this season! As always, it's a pleasure to send you this magazine.

**Paul Sanders**



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[ SPOTLIGHT ]

# 28

## The Neuroscience of Business

Leadership expert **René Rodriguez** discusses how understanding human behavior can make a business more trustworthy to customers.

03

SALES

### An Email-Segmentation Overview

Learn how to be more intentional and efficient with your email blasts.



04

LEADERSHIP

### Lead by Listening

Find out how to use active listening to improve efficiency and grow your authority as a leader.



08

MARKETING

### Relationship-Building for Business Growth

Discover the power of collaboration in your business relationships.





**PETS**

**11 | The Unexpected Power of Pet Marketing**

Charm your target audience with pet-themed marketing initiatives.



**PETS**

**22 | Attract New Customers with Social Media**

Use these techniques to boost both your online presence and your business.



**ENTREPRENEUR**

**36 | The Fail-Fast Mentality**

Weigh the advantages of quickly abandoning underachieving business strategies.



**TECH**

**12 | Navigating a Digital Transformation**

Tips for helping your organization undergo a smooth digital transformation.



**PRODUCTIVITY**

**16 | Improve Your Business's Video Content**

Find out how to make your videos stand out from the rest.

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# An Email-Segmentation Overview

Emails are a time-tested way to get your message across, and segmenting your list can make it even more effective. BY MATTHEW BRADY

**AS A BUSINESS OWNER**, you always want to deliver your message to your ideal audience, and one proven way to do so is by segmenting your email list into smaller groups. Consider the following factors to get more bang for your marketing buck and improve the likelihood that your email recipients become raving fans.

**Who: define your demographics**

Determine which personas are best suited for what you provide. Age, gender, household size, income, and education are just some crucial characteristics to weigh.

**What: understand their driving forces**

Ask questions about what your customers like. What are their interests? What have they purchased before? What groups are they part of?

**When: track their times**

Look at metrics such as when they shop and do searches to pinpoint the best time to reach them and boost your chances of getting a positive response.

**Where: put them in their places**

Are you primarily focusing on a local, regional, or national market? Also, assess components such as where the recipients go to shop and which stage of the sales funnel they're in (just learning or on the verge of buying).

**Why: dig deep**

On a basic level, determine their needs-versus-wants spending (i.e., If they bought your product, would it be discretionary?). Also, more than ever, consumers value the purpose behind their purchases, so understanding their "why" can be critical to your email marketing efforts.

**How: their methods of choice**

On which platforms do they spend the most time? How do they prefer to make purchases—in person or



online? Do they typically pay via cash, credit, or digital wallet? Perhaps most importantly, how can they best find out more about you?

Once you've established your segmentation criteria, document it and create content accordingly. Then test your emails' click rates and open rates to ensure that your breakdowns are achieving first-rate results. ■



**Determine which email-segmentation criteria best suits your business needs so you can create cost-effective campaigns.**

# Lead by Listening

Active listening is an overlooked yet vital practice that can help any leader make the most of their time and earn the respect of their employees.

BY ALEXA BRICKER

**AS AN ENTREPRENEUR**, you are deeply passionate about your business. Intensity can be a great motivator on your journey to success. However, it can also give you tunnel vision as a leader, compromising the decisions you make.

Luckily, there's a simple strategy you can lean on to prevent it from negatively impacting your organization: active listening. Here's how you can use this powerful tool to your advantage to strengthen your authority as a leader.

## 🕒 **What is active listening?**

Before you assume that you already know everything about listening, try this exercise: Think about the last conversation you had with someone. What is the first thing that comes to mind about it? How did it make you feel? Was it tense, positive, or inspiring? Can you remember the other person's tone or body language?

If you aren't able to answer any of these questions, then you weren't actively listening. This practice involves being present, open, and fully engaged in everything the other person does and says—so much so that you pick up on subtle nuances you may not otherwise notice.

It's not hard to see why this is such an important business skill. You need to feel confident that your employees understand you clearly and vice versa, which can be difficult when you're being pulled in a million different directions. Active listening is a relatively small investment you can make to help accomplish this.

## 🕒 **Honing your skills**

The Center for Creative Leadership breaks down active listening into six techniques: pay attention, withhold judgment, reflect, clarify, summarize, and share. Keep this breakdown in mind while in one-on-one or group conversations with your teams.



### ***Pay attention***

Make sure to remove all distractions from your environment: turn off email and message notifications, minimize open projects on your computer, and consider leaving your cell phone in another room. This will ensure that the person you're communicating with is your top priority.

### ***Withhold judgment***

Enter every conversation with an open mind. People want to feel like they're making a significant contribution, so even if you disagree with an idea or proposal, resist the temptation to cut them off. Instead, hear them out to the end, and then collaborate with them to come to a solution that works for both of you.

**Mirroring is a very useful communication device that involves tapping into and matching a person's verbal and physical cues to make them feel more relaxed and connected to you.**



### Reflect

Mirroring is a very useful communication device that involves tapping into and matching a person's verbal and physical cues to make them feel more relaxed and connected to you. For example, if you're conversing with someone who is energized and animated, try to keep your responses lively and engaged as well.

### Clarify

If you're paying close enough attention to someone, you'll naturally have questions about what they're conveying. Don't be afraid to repeat what they've said to you and ask for a deeper explanation. Keep your questions open ended rather than geared toward yes/no answers to maintain a good conversational flow.



## The Center for Creative Leadership breaks down active listening into six techniques: pay attention, withhold judgment, reflect, clarify, summarize, and share. Keep this breakdown in mind while in one-on-one or group conversations with your teams.

### Summarize

Throughout the discussion—preferably after any new point is made—be sure to recap what's been talked about to avoid confusion and set clear expectations for what both parties should do when the conversation is over. This is particularly helpful for long exchanges, where the main topic can easily be strayed from or lost.

### Share

Each person brings their own biases and opinions into a conversation, but it's critical to put these predispositions on the back burner while the other person is speaking so that you can both feel comfortable opening up. Only introduce your own thoughts and experiences after your conversation partner has shared theirs.

### ⦿ The benefits

There's tremendous pressure on you as a leader, and every minute of your time counts. The more detached you are in conversations, the likelier you are to require follow-up discussions and extra meetings and the less likely your team is to meet expectations. But when you're able to practice active listening, the more empowered your employees will feel and the more efficient your processes will run. Here are just a few of the benefits you'll reap:

- **An increased level of trust from your employees.** Employees who feel valued and listened to will appreciate and respect you. If they admire you, they'll want to work hard for you.
- **More efficiency in your business processes.** Imagine coming away

from a conversation where every person knows exactly what is expected of them and what they need to do. That is the key to optimizing workflows and making sure you squeeze as much value as possible out of each day.

- **A boost to your authority.** Your employees should be able to come to you with their thoughts, questions, and solutions to problems. Make people feel heard, and they're guaranteed to feel comfortable speaking up. This consistent flow of ideas can spur innovation and lead to business growth.

The busier you get as a leader, the more difficult effective communication can be. So tune out the noise, tap into what your people have to say, and make them feel seen and heard—your business will thrive in return. ■

Take  
Action

Write down at least three active-listening tools you can bring to your next conversation.



# Relationship-Building for Business Growth

Building trust and mutual respect in your professional relationships can help you leverage new opportunities for your business.

BY **BONNIE JOFFE**

In today's competitive business landscape, it's more important than ever to nurture strong relationships with other professionals. This means being more than just another contact, instead taking it one step further to become a dependable resource and trustworthy ally. Here are some fundamental ways to create more value in your strategic partnerships.

## Know your unique selling proposition

Delivering value starts with having a clear understanding of what you can and want to offer, then outlining your long-term goals and a road map for achieving them. You may wish to create synergistic relationships with professionals from various industries within your network to build connections for potential future collaborations. Alternatively, you could concentrate on forming lateral connections—linking with individuals in similar roles as you—to jointly

explore new concepts and work together on projects. Once you know your purpose, providing value and receiving it in kind will be much easier.

## Diversify your network

Partnering with fellow business professionals provides a platform for both sides to exchange their knowledge, experiences, and effective business strategies. To thrive personally and professionally, you must step outside your





comfort zone to establish new relationships rather than rely solely on familiar and comfortable connections. Begin by actively seeking meaningful conversations with individuals you don't know, initiating interactions during a meeting or event, reaching out via LinkedIn, or working with professional groups on social media. Doing so can help you significantly expand your network: every new person you meet has the potential to introduce you to their sphere, and you can do the same for them in turn.

### Become involved in your community

Engaging with individuals in your local community can produce positive results for your business. When you contribute to the well-being of those around you, you're not only building connections with professionals in your area but also actively participating in corporate social responsibility (CSR). It's worth noting that, according to the consulting firm Accenture, a significant 74 percent of consumers

express a greater inclination to support businesses involved in CSR initiatives.

### Build trust and respect

First impressions are everything in business—these initial interactions can make or break a relationship. You need to lay a foundation of trust and respect right away, which requires being genuine. Focus on getting to know each person as an individual by actively listening and displaying interest in what they have to say. In addition, be as open and honest as possible, and share your experiences so they feel more comfortable doing the same.

Additionally, it's imperative to demonstrate your reliability as you continue to nurture these professional relationships. For instance, if one of your contacts expresses an interest in meeting the CEO of a company with which you have a strong relationship, offering an introduction is only valuable if you can follow through and fulfill your commitment. This demonstrates your reliability





and trustworthiness in keeping your word. Also, while many genuinely want to help others, it's prudent to exercise caution when seeking advice or requesting favors from your professional network. For example, phrases like "Can you introduce me to so-and-so?" or "May I seek your guidance on a specific matter?" should only be employed once a foundation of rapport and respect has been established to avoid prematurely calling in favors.

### Engage in face-to-face interactions

Meeting others in person offers significant advantages. According to Forbes.com, face-to-face networking remains the most effective means of sealing deals and expanding your professional sphere. Remarkably, 95 percent of professionals believe that in-person meetings are pivotal for business success and such interactions boast a close rate of 40 percent.

Furthermore, in-person networking allows you more opportunities to exchange physical business cards, a key element in establishing robust connections. Something as basic as business cards can leave a strong initial impression and are frequently retained and referenced later by

many individuals. (Keep in mind, though, that while digital versions can be practical, physical cards have a more enduring impact.) Finally, maintaining contact and extending casual invitations for coffee or lunch, even without a specific agenda, can be highly beneficial for nurturing relationships.

### Find opportunities to collaborate with others

Connecting with fellow business professionals provides an avenue for both sides to exchange their knowledge, experience, and business strategies, which in itself can be immensely beneficial. It also allows you to see where your objectives align so you can determine if working together would offer mutual benefits. For example, let's say you're a financial advisor organizing a seminar on retirement planning and savings. Instead of pursuing this endeavor alone, you could partner with an elder law expert to address the legal aspects of retirement. Combining these insights will allow you to reach a broader and more diverse audience. This collaborative, value-enhancing strategy has the potential to foster the growth of both your businesses.



**According to Forbes.com, face-to-face networking remains the most effective means of sealing deals and expanding your professional sphere.**

### Connect your sphere with others

Collaborating with other businesses to pool resources is merely one avenue to create value, as building social capital can be a crucial component of showcasing your worth. This means being recognized as a superconnector—someone genuinely

interested in helping others without expecting anything in return. In the end, this benefits everyone involved: the people you connect can establish new professional relationships they might not have found otherwise, and you can build a reputation as a reliable resource, which can ultimately strengthen your business. ■

**Take Action**

**Analyze your professional network, and reach out to at least one business leader who you could collaborate with.**



# The Unexpected Power of Pet Marketing

Elevate your marketing and entice your audience with the near-universal appeal of companion animals.

BY ANDRE RIOS



**T**RADITIONALLY, FAMILY-THEMED MESSAGING has dominated many organizations' marketing strategies. Copious social media posts feature jovial parents and children, while numerous banner ads use clickbait language that triggers parents' nurturing instincts. ("What could be lurking in your home's drinking water?") But family content might not be the only method to reach your target audience, as another category of content has proven incredibly lucrative over the years: pets.

Pet parents might be a greater populace than you realize—over two-thirds of American homes include at least one pet, according to the American Pet Products Association, and even those without a four-legged friend may find it difficult to resist their adorable faces. Therefore, pet owners could be an enthusiastic audience in search of content they find relevant to their lifestyles and interests. Done well, unique and endearing pet-themed marketing could stir greater consumer interest and generate more leads for your business.

➤ **Steal the screen**

Attracting eyes to your social media content or targeted ads can be challenging—consider that over half of businesses spend 15 percent of their marketing budget on

Facebook ads alone, according to marketing data experts at WebFX. So featuring adorable animals may be a tantalizing way to stop viewers from scrolling and increase engagement to boost your ROI.

Think of incorporating animal imagery into marketing like squeaking a toy at a frenetic pet; a tongue-wagging dog or curled-up cat is practically irresistible to the human eye. Therefore, leveraging such content could make your product or service more attractive in an overwhelming barrage of near-constant advertising. Why would your audience bother to read text-based

ads when a cute animal is lingering on the other side of their feed? Lock in their focus, then hook them with appealing messaging about your organization. (Just don't go overboard with the pet puns.)

➤ **Win more appeal**

A common recommendation to transplants in new towns is to get a dog, go to a dog park, and strike up conversations with potential acquaintances (with the aid of their canine, who may likely be more eager to approach strangers). When pet owners talk about treats, behavioral quirks, and other animal-care topics, they form an instant bond with one another, even if only a

*Think of incorporating animal imagery into marketing like squeaking a toy at a frenetic pet; a tongue-wagging dog or curled-up cat is practically irresistible to the human eye.*



mild one. Leverage this type of dog-park parlance in your own marketing, and you can bridge the difficult gap between being a stranger and being someone your audience should know, like, and trust.

In other words, pet messaging and imagery may help you kindle a connection with new leads who have never heard of your business, let alone considered purchasing your goods or services. Try sending email newsletters with pet-themed subject lines and related imagery to increase engagement. For a real-life marketing example, take your pets to events like trade shows and hand out treat bags branded with your service details and contact information. Once you resonate with your audience, you can strike up conversations, boosting opportunities to guide people down the lead funnel and to conversion.

➤ **Bolster your brand**

Incorporating animal companions into your marketing also boosts your brand identity. Spotlighting employees and their pets in



social media posts, for instance, could not only make your company relatable to a large swath of your audience but also enhance your team’s public image. Leads may view them more as caring, sympathetic, and authentic people, an impression that can reflect positively on your entire organization.

You can even strategically select pet-based imaging like a logo or website layout that closely aligns with your brand identity. Are you an all-American, family-oriented organization? Golden retrievers are practically synonymous with wholesome family life. To cement your business as cutting-edge and contemporary—excellent traits of a graphic design or software company—feature snakes and other unconventional “alternative” pets. This may not be a subject you have pondered in the past, but doing so can help you cultivate a unique identity and heighten your brand’s visibility.

➤ **Tap into geotargeting**

Pet marketing is especially effective when reaching out to certain communities. In 2023, *Forbes Advisor* tallied the best cities for pet owners based on metrics like access to pet-



friendly spaces and affordable veterinary care, and it found an impressive distribution of pet meccas across the nation. Tucson topped their list, followed by Raleigh, Nashville, Wichita, Cincinnati, Plano, and Albuquerque. Other highly ranked cities represented a great swath of the United States.

What does this mean for your marketing strategies? Clearly, businesses in *Forbes Advisor’s* ranked communities should understand the potential impact of pet-themed marketing. But even those with a broader or nationwide audience can geotarget communities based on their

appeal to pet owners and drum up consumer excitement in these areas. For example, an insurance agent aiming to geotarget Nashville might vary typical country music-themed marketing with pet content in their rotation of ads, social media posts, email newsletters,

and more. Phrases such as “You Can Both Woof under a Safe Roof” over an image of a pet owner cuddling their canine may read as particularly relevant to Nashville homeowners who are considering adding pet liability coverage to their homeowners policies. Such messaging could increase post

engagement, website traffic, and, eventually, revenue as well.

➤ **How to market with pets**

Given the multiple advantages to mine from pet-themed marketing, you may be eager to start tinkering with your existing methodology and integrating animal content. Consider some of the following tactics for your organization, which could inspire activities suitable to your brand.

*Pet-of-the-week posts*

Encourage employees throughout your organization to submit images of themselves with their pets—or, if a viable option, invite them to bring their pets to work for special events. Team members will likely enjoy showing off images of their four-legged friends, which you can then borrow to post across various social media platforms (with prior notice, of course). It bears repeating that pet content is popular—as of this publication, there are over 300 million results for #dogsofinstagram on the platform—so pet-themed posts can draw new leads to your brand and also endear existing clients who already follow your socials. If these posts garner successful engagement, you could even consider



adding photos of your team with their pets to the “About Us” or “Meet the Team” page of your website.

**Educational content**

Content marketing is integral to targeting your audience, providing it with items of value and ultimately drawing new traffic to your website. The most effective content is that

which educates about relevant topics, establishes you as an expert in your industry, and, of course, engages your audience. And one creative way to develop click-worthy, endearing content is to incorporate pet subject matter and imagery.

Contemplate how you can marry your business’s mission with pet-relevant

topics to increase clicks. For example, a financial professional could publish blogs about budgeting for pet-care expenses, while a business owner in the health-care or beauty industry could explain the wellness benefits of living an active lifestyle with a pet.

Try working animals into various types of content and tracking the



**Incorporate pet-themed content across several marketing mediums, including your emails, social media, and website. Then perform metrics like A/B testing to gauge their performance.**

results. You may find that your clients are more likely to keep direct mail products that feature charming pet photos or open emails with animal-themed subject lines. Continually brainstorm other concepts to find ones that heighten your appeal to targeted demographics.

**Client-appreciation events**

Hosting or appearing at live events is an excellent way to demonstrate client appreciation, greet new leads, and promote your brand. Consider aligning your business with organizations centered on pets, such as free heartworm-vaccination services, or hosting a clients-and-their-pets appreciation event at a park. If you truly wish to get hands-on with your marketing, consider washing some dogs at



a pet-grooming event to start conversations with their owners. Remember, every single chance to position your organization before the public is an opportunity to guide prospects down the lead funnel.

Pet events like these are sure to turn heads and offer greater exposure. “Look at all those dogs in that parking lot!” passersby might remark. Promoting these occasions

on your social media or in your email newsletters can even help drive traffic. Additionally, engaging existing and potential clients in such a personal manner can help build gratitude toward your brand, particularly if you provide a community service like complimentary grooming at your event. This feeling of gratitude may convert into excellent customer ratings and referrals—treats that any organization would roll over for. ■



PETS

# Attract New Customers with Social Media

There are around five billion users of social media worldwide. With a few simple strategies, you can effectively tap into this vast potential customer base for your business.

BY LAUREN KIM



If you're looking to grow your client list, perhaps the best place to turn is social media. With its accessibility, this tool can be incredibly effective for building your credibility, showcasing your expertise, and standing out from the crowd. Follow these guidelines to broadcast your message and significantly expand your reach.

### → Understand your audience

A key aspect of attracting your target demographic is creating content that will appeal most to them. To determine what that is, look at your competitors' pages, directly ask your followers what they'd like to see on your pages, and read their comments on your posts. You can also examine the analytics of each social media platform you use or utilize an external tool like Buffer or Zoho Social to access helpful information like your followers' location, age range, and gender and when they're most active online. You can then tailor what and when you post according to your findings.

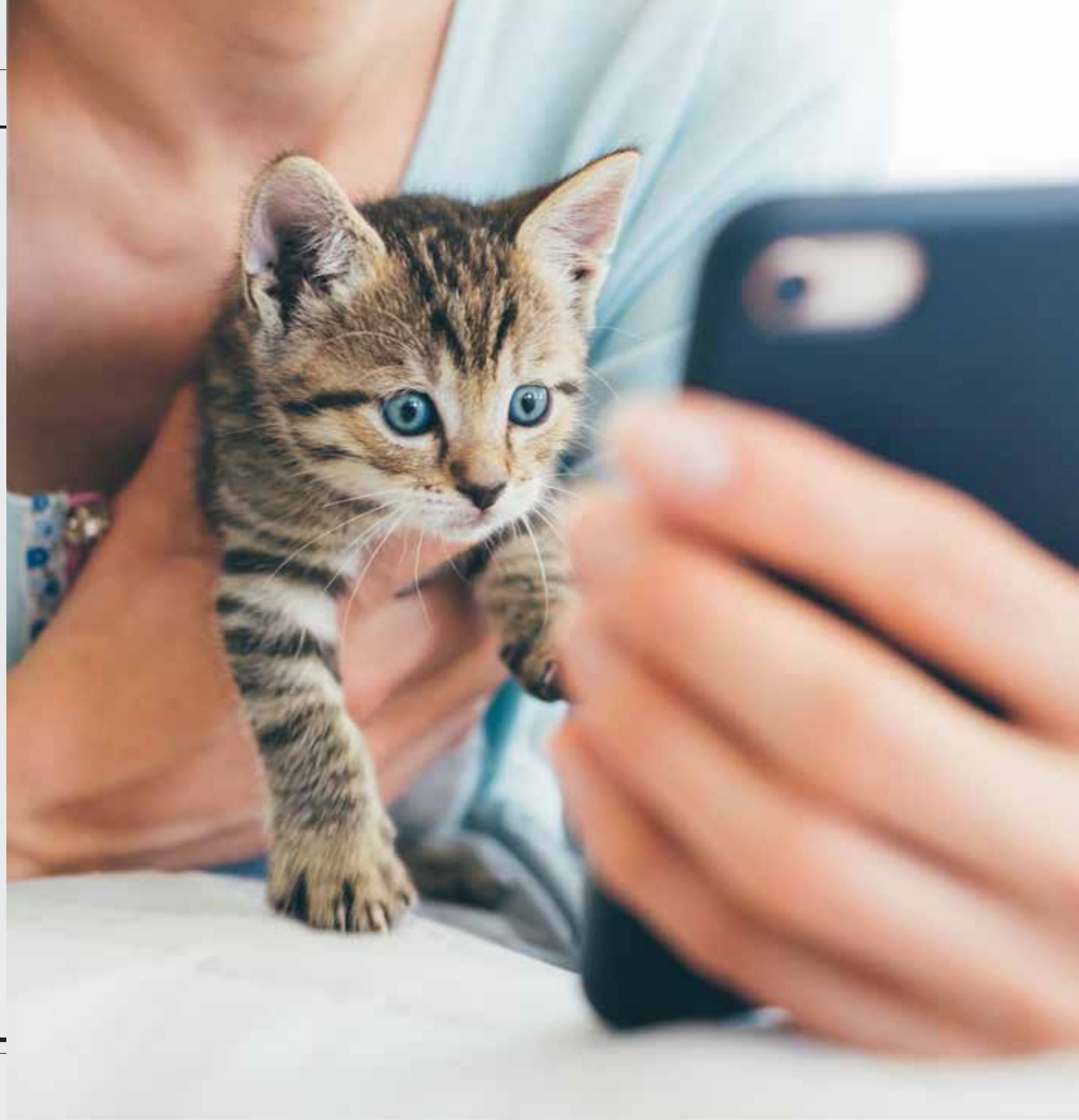
### → Use video

To get the most engagement, share short-form videos no longer than a minute. These mini clips can efficiently convey information while quickly capturing your audience's attention and are more likely to go viral. They're most ideal for showcasing your brand's personality and introducing new products. You don't even need expensive equipment to get started; you can create your videos with your

smartphone, use the provided editing tools to perfect them, and upload them directly to Instagram, Facebook, TikTok, or another platform. To finesse your videos even more, try a free or low-cost editing program like iMovie or Canva. (For even more tips, check out our guide to improving your videos in this issue.)

### → Instruct and inform

Providing quality content that educates and inspires can help establish you as a credible expert in your industry and snag new clients. Take, for example, Doug and Elizabeth Simpson, owners of Tenderfoot Natural Dog Training in Boulder, Colorado. Their no-fuss, straight-to-the-point videos feature their adorable pets and demonstrate fundamental dog-owning basics, such as how to hold a leash, feed your pet, and soothe your dog. Through regularly sharing their dog-training insights online, they have amassed more than 63,000 followers on Instagram, along with clients from around the globe.





### →| Be consistent

Growing your following and, consequently, your customer base, requires sticking to a consistent schedule, such as by posting every Monday and Wednesday at 9:00 a.m. When you're predictable, your followers will know when to expect new content and will come to see you as a reliable and trustworthy resource. Examine your top-performing posts to determine which days and times get better results, then use that information to create a schedule. To help ensure that you stick to it, plan your content in advance and consider using a tool like HootSuite or Sprout Social, which will allow you to preschedule and automate posts across multiple social media accounts at once.

### →| Entertain them

Getting people to stop on your posts as they rapidly scroll through their feeds can be difficult. You'll need a way to catch their eye, whether it's by using engaging photos and videos, adding trending or popular music, or displaying a quirky sense of humor. Jess Rona, a dog groomer in Los Angeles with more than 309,000 total followers on Instagram and Facebook, creates all sorts of unique reels and posts to promote her

business, including a video that shows her intensely grooming a client to *The Godfather* theme, which ends with a windblown glamour shot of the freshly coiffed canine in a dapper collar and tie.

### →| Be personable

Today's consumers value personal and authentic content, so don't forget to show your company's human side. By highlighting the story behind your mission and the people who make up your team, you can help consumers better relate with and trust your brand. There are many ways to do this, including sharing a behind-the-scenes look at your company, posting live during important events like product launches, and sharing the work you do for the charitable causes you support.

### →| Engage with others

Social media isn't a vacuum—rather than simply composing posts, you'll need to meaningfully interact with your followers and others in your niche or industry. Make it a priority to answer questions promptly, which can both position you as an expert and boost the rapport between you and potential new customers. In addition, share the testimonials and success stories clients disclose about



Getting people to stop on your posts as they rapidly scroll through their feeds can be difficult. **You'll need a way to catch their eye**, whether it's by using engaging photos and videos, adding trending or popular music, or displaying a quirky sense of humor.

your brand. Doing so can encourage others to convey their own positive experiences with your brand, in turn attracting even more customers to it.



### →| Offer more

Continue the conversation with your followers by including a call to action in your posts. This could include asking them to visit your website or including links to your products in your posts. For instance, the Simpsons highlight their four-part, eight-hour training video in their Instagram profile, encouraging followers to check it out. They also include a link in their bio that allows visitors to get access to multiple resources, such as their shop or latest blog post, with just one click.

Social media can powerfully boost your brand, but it can take time. With persistent effort and some trial and error, though, you can grow your following and turn these followers into loyal customers. ■

**Take  
Action**

Brainstorm ideas for a short video you can create to express your brand's personality.



# THE NEUROSCIENCE OF BUSINESS

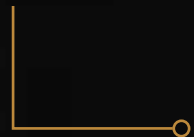
Leadership expert, keynote speaker, and best-selling author **René Rodriguez** delves into the qualities that can help you amplify your influence and earn trust.

BY **MATTHEW BRADY**





THE CENTRAL COMPONENT TO ANY SUCCESS, WHETHER YOU'RE IN LEADERSHIP, SALES, REAL ESTATE, INSURANCE, OR FINANCIAL ADVISORY, IS THE ABILITY TO INFLUENCE BEHAVIOR."



WHILE SOME PEOPLE KNOW THEIR CAREER PATH FROM THE TIME THEY'RE YOUNG, THAT DOESN'T ALWAYS MEAN THEIR ULTIMATE JOURNEY IS A SMOOTH ONE. MANY FIND THEMSELVES CLIMBING QUICKLY TO WHAT THEY THINK IS THEIR DESTINATION ONLY TO ABRUPTLY HIT A DEAD END INSTEAD.

Take René Rodriguez, for example. His life reached a crossroads during his sophomore year at the University of St. Thomas in Minnesota when he was cut from the school's basketball team. "I was devastated," he reveals. "I thought I was going to play in the NBA. That was my dream."

Left without a plan B, Rodriguez got a much-needed jolt of inspiration from his mother, who gave him an odd task: to look around the room they were in and determine what everyone had in common. "I tried to figure out whether it was their skin color, where they were from, or what they were wearing," he shares. "None of it was making any sense."

The answer she was seeking? Everyone there had a brain.

"She told me that if I understood how the brain works, everything would become easier," he says. "I took that to heart."

Indeed he did. That motherly wisdom sent him down a psychology path in college, and for over twenty-seven years, he has applied behavioral neuroscience to both leadership and sales, including as CEO of multiple businesses. Today he is the CEO of Volentum, a company that helps organizations better themselves and their customer relationships, a sought-after keynote speaker and coach, and the author of the best-selling book *Amplify Your Influence*.

This success can't all be solely attributed to his mother's guidance, however. As a young man, he got even more practical advice (some unintentional) that helped shape him into the entrepreneur he is today.

• FINDING VALUE

Two weeks after his basketball dreams were dashed, Rodriguez had the opportunity to talk to the leader of a large organization. "I asked him the one thing I had to do to be in his shoes when I got older," he recalls. "He looked at me, smiled, and said, 'Renè, you have



to learn how to sell. If you do, you'll always be employed.' As a teen, I didn't really know what selling meant as a profession, but his words stuck with me."

He soon would, however. Later that month, Rodriguez was told that he had been chosen to join a fast-paced sales-and-marketing company in the health-and-wellness industry. Excited about the opportunity, he eagerly showed up—only to discover that it was mass recruiting for cookware sales. "I learned how to sell \$2,500 cookware sets at eighteen years old," he says. "Some nights, I was closing \$10,000 worth of cookware and making 50 percent on it. I gave the *exact same* sales presentation in my communications class one day—and the professor gave me a C! That was an eye-opener." Remarkably, Rodriguez credits this experience for forming a foundational principle in him: appreciating value creation.

#### • OVERCOMING RESISTANCE

After college, Rodriguez was hired by a change-management consulting firm that dealt with massive-scale culture change using brain research, which was right up his alley. "I was doing hard-core sales, incorporating neuroscience,

and learning about change management," he remembers. "That led me to understand that sales is about behavior. In fact, the central component to *any* success, whether you're in leadership, sales, real estate, insurance, or financial advisory, is the ability to influence behavior. And since influence is a science, it can be learned by anyone; we've trained over 100,000 people to be more influential."

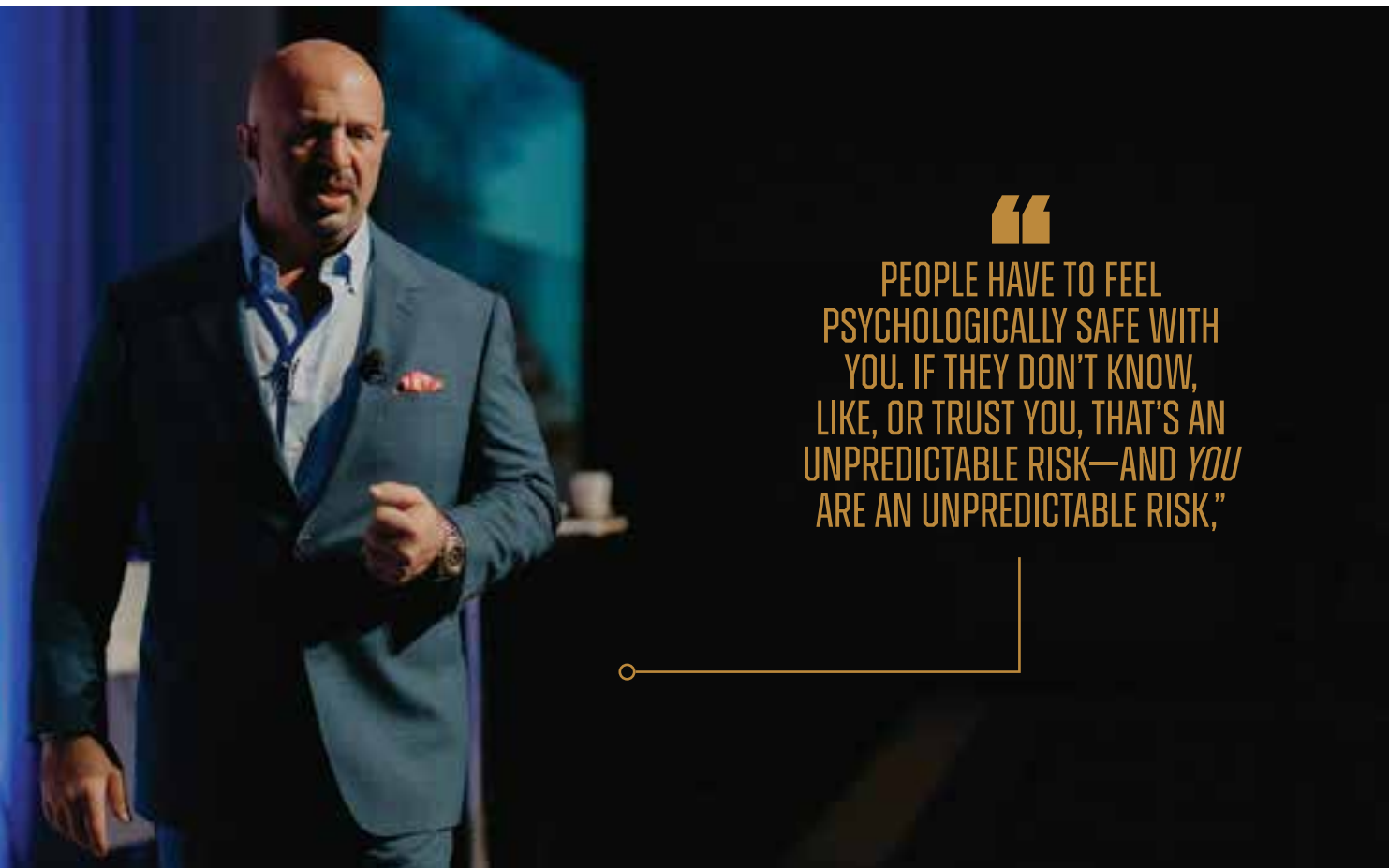
Rodriguez notes, though, that change isn't easy—psychologically, we're designed to resist it. One way we do this is by regulating our environments for safety, hence why we'll walk right around a corner in a familiar town but hesitate to do the same in an unfamiliar one. We also have something called negativity bias, about which Rodriguez says, "We're designed to see and be impacted by the negative, not because we're pessimistic but because doing so keeps us alive longer."

#### • WALKING A FINE LINE

Rodriguez insists, though, that there's a primary difference between addressing pain points and manipulating through fear. "In sales, we solve problems for profit—and that's a good thing," he insists. "Say my truck needs an oil



WE'RE DESIGNED TO SEE AND BE IMPACTED BY THE NEGATIVE, NOT BECAUSE WE'RE PESSIMISTIC BUT BECAUSE DOING SO KEEPS US ALIVE LONGER."



“**PEOPLE HAVE TO FEEL PSYCHOLOGICALLY SAFE WITH YOU. IF THEY DON'T KNOW, LIKE, OR TRUST YOU, THAT'S AN UNPREDICTABLE RISK—AND YOU ARE AN UNPREDICTABLE RISK,**”

change but I work and travel a lot, so it's a pain to drop it off. If someone offers to take care of it all without me having to lift a finger, I'd choose that every time, even if it costs double.”

“However, if ten wonderful things are happening, taking 1 percent of something bad and shining a big, bright light on it for the sake of profit can be problematic,” Rodriguez says.

“That's manipulating negativity bias in a nutshell. The media persists in doing this even though things are really good overall—statistically, there's never been a better time to be alive in history.”

• **ESTABLISHING TRUST**

As every business owner knows, standing out in an ever-increasing crowd can be challenging. Yet

Rodriguez states that it often comes down to one factor: the level of trust in business relationships. “People have to feel psychologically safe with you. If they don't know, like, or trust you, that's an unpredictable risk—and you are an unpredictable risk,” he shares. “The good news is that trust functions in a certain sequence in the brain, so if we can understand that order, we can follow it.”

To that end, he offers four ways to allay such fears, create confidence, and build relationships:

• **SHOW UP WITH INTENTIONALITY**

Do you give a friendly smile and welcoming handshake? Do you actively listen? Rodriguez does these very things before his presentations, both for himself and for the audience. “The butterflies never go away, but you can teach them to fly in formation,” he admits. “I walk through the audience because I like to know who's out there. And just shaking people's hands calms me down and lowers their defenses.”

• **CREATE AN AUTHENTIC BRAND**

Think of one word: McDonald's. For many, its golden arches elicit smiles because they're safe—no matter where you are in the world, they make you feel at home. You should aim to make your customers feel the

same way about your brand, even if on a much smaller scale. “Brands are a great way to create safety because they offer a predictable experience,” Rodriguez says. “I'm a firm believer in building a strong personal brand that is truly unique to you. In the end, this is often the only thing that makes you unique.”

To achieve this, he says to open up and reveal the real you: who you are and what you believe. “It's all about authenticity,” he adds. “When people actually meet you, are you the exact same person they see in videos or on social media? If so, your unique story as a leader can become the frame for your company's likewise unique value proposition.”

• **BE AWARE OF WHAT YOUR BODY LANGUAGE SAYS**

Along the same lines, you've surely heard the dismissive phrase “They say one thing but do another.” This can happen to salespeople and other professionals without them even realizing it, according to Rodriguez. “Mind-body alignment is crucial for success, but a person's mouth will often say something while their body says something else entirely,” he says. “That's incongruency, and on a subconscious level, it causes mistrust. If you have congruence, though, your words

are going to follow your body and vice versa.” This is the focus of Rodriguez's AMPLIFII course, an intense three-day weekend where he studies businesspeople closely and teaches them how to be in congruence so they can be better leaders and influencers.

• **FACE YOUR PAST**

That said, it can also be difficult to really know, let alone express, your core values—and that's exactly what Rodriguez and his team try to get to the root of. “The work anybody does serves one of two purposes: honor their past or heal it,” he states. “We know that values form between the ages of nine and thirteen, so what experiences during that time shaped yours? I try to help people take a deep dive to uncover that answer. Just because you haven't found the words to express your values doesn't mean you don't know them.” He adds that this is the purpose of his book: helping people put the words to their values so they can verbally marry who they are to what they do. “In the end,” he concludes, “the result is always purpose and clarity—for you and your customers.” ■

For more info, visit [meetrene.com](http://meetrene.com)



Ask yourself, from a nonbusiness perspective, what you truly value as a person. Does it reveal itself in your business and leadership? If not, find ways to better align the two.

# The Fail-Fast Mentality

Failure is more than a possibility in the business world—it's almost a guarantee. However, if you embrace the mindset that missteps aren't fatal but actually welcome segments of your organizational strategy, you can propel your entire team to succeed.

BY LUKE ACREE





**ONE OF THE GREATEST** pieces of encouragement I've ever received is to greet failure without fear. There's immense wisdom to be gained from adversity and new opportunities to be found by letting go. You may have heard several adages along these lines, but I personally enjoy how motivational speaker Simerjeet Singh puts it: "Your mistakes don't define you. If you learn from them, they tend to refine you."

There's an art to going up in smoke—you have to fail *fast* and do it intentionally. This might make you pause for a second and wonder, *Why would anyone choose to fail?* But if you follow the proven wisdom behind the fail-fast mentality, you can abandon ineffective business strategies, rework your way to superior tactics, and chase new, bolder efforts to achieve greater organizational success.

**Weigh risks and rewards**  
Any financial strategist would advise that there is no reward

without risk. Some investments may not pay off—and, in fact, may even be costly—but hunting down the ones that pay dividends is certainly worth the chance.

Back in August 2023, my company, ReminderMedia, attempted a new client onboarding strategy. We started hosting webinars for our clients at 7:00 p.m. eastern time, anticipating that they may prefer to step away from their primary tasks and focus on new marketing services after ordinary business hours close.

We were wrong. These webinars were poorly attended, to the point that they were virtually a waste of man-hours. We had our webinar team promptly abandon this strategy, and then we promptly returned to the drawing board to craft a better scheduling system.

But that's nothing new for us. At ReminderMedia, we encourage every member of our staff to embody FEARLESS principles. This

**There's an art to going up in smoke—you have to fail *fast* and do it intentionally.**

acronym encompasses various traits of successful people, such as "action" and "leadership," all of which coalesce around the central tenet of acting without fear and rigorously pursuing goals without reservations.

This business style might sound precarious or even downright reckless, but chasing goals without fear weighing you down is what will allow you to reach them. The perception that top entrepreneurs

are unblemished figureheads who never miss is a total myth. They fail all the time; they just know how to pivot from these misses, identify valuable lessons, and take new risks in pursuit of other opportunities that may pay

off. In other words, if you're never losing, you're not taking enough risks.  
**Correct your course**  
While it's essential to accept risk, you also have to be willing to admit failure.





comes to their staff. They set strict quotas for their personnel, reward consistent top performers, and then periodically let go of those who just aren't closing enough deals. It can be tough to lose people, but trimming the fat in this way can help you create a team of across-the-board winners.

For a master class on how to course correct, take a look at IBM's Garage Methodology, a strategic guide to the good business workflows and practices it employs through all reaches of the organization. These tactics are designed specifically for tech companies, but they're so ingenious that they can be applied outside this industry as well. Check out one of its core tenets: "People have the freedom to fail, but with each failure [they] learn something that enables success."

Here's another golden nugget from IBM: "You have a limited amount of time, people, and money to get an idea right. The longer it takes you to realize that an idea isn't a winner, the more resources you waste." This is the "fast" in the fail-fast mentality. You aren't just willing to risk failure; you're also willing to respond immediately when it happens and redirect your efforts toward something new. This can

Practicing a fail-fast mentality means knowing how to identify botched business practices and scoop them into the trash bin. To do this, you need to look over your organization with an eagle eye to find fiscal or time sinks that might be operating right under your nose. For example, you and your team leaders could meet periodically—perhaps quarterly—to

review your strategies and clean house where necessary. Run financial audits, gauge consumer feedback on your products or services, and review suggestions from employees under your wing. What's working out? And, just as crucially, what *isn't* working out?

Good sales leaders are particularly adept at this, especially when it

actually be the one of most exciting aspects of leadership. You get to roll up your sleeves, dig deep, and brainstorm new solutions. What new strategies could you uncover when you reevaluate underperforming practices like a frustratingly slow shipping system? The solution may be elusive at first, but it'll be incredibly satisfying when you discover concepts that can produce better results.

#### Practice cautious courage

When you're unafraid to fall, you're more willing to take leaps. What happens if you charge straight through that wall of fear that holds people back? You could happen upon something revolutionary, like an expanded digital store, an online booking system with a simpler user interface, or even a completely new business model.

Of course, there is always natural risk involved in any of these changes.



Reflect on how you can make the fail-fast mentality a pillar of your organization's culture.

## Practicing a fail-fast mentality means knowing how to identify botched business practices and scoop them into the trash bin. To do this, you need to look over your organization with an eagle eye to find fiscal or time sinks that might be operating right under your nose.

While some of your efforts will pay off, others won't. Clients may be upset by overhauls to practices they've grown used to, or you could drain time and money designing and implementing these novel strategies. But you'll never know unless you try, and your efforts will never pay off unless you devote time to your more fruitful ventures and conserve resources by dropping the ones that disappoint.

To wrap up, I want to share this extra piece of wisdom from IBM Garage: "As your team embraces the notion of failing fast, it gets used to experimenting and recovering from unexpected circumstances as part of the development cycle. Everyone becomes confident that discovering the unknown and reporting on it is respected and treated as a contribution to the project's success." Be a brave leader who guides your

organization through ups and downs, and you can motivate your team to not only overcome failures but also work together to make waves. Though you might fall down sometimes on your road to success, the triumph is in getting back up. ■



About the author: Luke Acree is an authority on leadership, a lead-generation specialist, and a referral expert who has helped more than 100,000 entrepreneurs and small businesses grow their companies. He hosts *Stay Paid*, a sales and marketing podcast, and has been featured in *Entrepreneur*, *Forbes*, and *Foundr.com*.



TECH

# Navigating a Digital Transformation

Taking the plunge into a more digitized world can be easier if you follow certain steps.

BY MATTHEW BRADY





**H**CHANGE IS A NATURAL PART OF LIFE, yet it's often dreaded. After all, who knows what may happen when you take a leap into the great unknown? Business owners know about this uncertainty all too well, especially first-timers. Once you get your feet wet, however, change usually becomes second nature—you'll likely even welcome it.

One important area where change is necessary is technology, a constantly evolving beast that creates a keep-up-or-lose-out reality but also virtually endless possibilities. By leading your company on a digital transformation, you can improve efficiency, increase employee and customer satisfaction, and gain a competitive advantage in your industry. Here are some important factors to consider along the journey.

### Do your due diligence

As the term indicates, a digital transformation is often all-encompassing for a company; it being a major initiative, then, you must be intentional with how you go about choosing your business's digital upgrade.

Start by sorting through the many options that are available, such as cloud storage, AI-focused programs, and software like a CRM; if tech isn't your forte, you could also task your most trusted team members with doing so. Gather your tech and department leaders, and discuss ideas about how a digital transition

could benefit both their respective departments and your business as a whole. Cost will also be a factor—your processes likely won't be cheap and may be rife with unexpected expenses—so you'll need to account for this in your budget.

### Remember your why

As you look over your options, keep in mind that you shouldn't select a system just because it's popular or it's what your competitor has. You need to specifically understand the goals, risks, and rewards of making this leap for *your* business. Is your aim to improve the overall customer experience, process transactions quicker, or improve your team's efficiency (or all of the above)? Knowing this answer can help you pinpoint the changes you should make.

### Buckle up

Frankly, employees tend to be the most skittish about digital change, especially since their current processes and systems may be ingrained in them. In addition, they

may have the reasonable fear that if AI-based technology could make their jobs obsolete.

Here's where your leadership skills will be vital. Practice complete transparency from the get-go, possibly even scheduling a town hall where you provide all the details and allow your team members to voice questions and concerns. Get them excited about how this change will improve their work lives, assure them that the company will provide ample time for training, and convey that you're all taking this monumental step toward a brighter future together. Also be sure to test the new systems before launching them fully, giving employees time to try them out and provide feedback. Besides working out any kinks, this will ensure your team that they're being heard and are a vital part of making this change happen.

### Practice and preach patience

Rome wasn't built in a day; likewise, your business's digital transformation won't happen overnight. Because there will



be so many moving parts, it's important to forecast a timeline for completion, share it with the entire company, and stick to it as best as you can. Otherwise, the period of limbo created by such a transition can seem to last forever for everyone involved.

That said, the intricate nature of this situation means that things may still take longer than

expected. If any delays do pop up, share them immediately along with new projections. Continue seeking feedback from your team (and customers, if appropriate), and make adjustments where necessary to smooth any wrinkles. Most importantly, exhibit steady, calm leadership, and you'll keep your team and your company headed in the right direction on your digital journey. ■



**Gather with your senior management team to discuss ways a digital transition could improve your business.**



# Improve Your Business's Video Content

Videos play a pivotal role in modern marketing strategies, offering businesses an additional way to connect with potential customers, increase brand recognition, and drive sales.

BY ALLISON GOMES

**T**HE RISE OF SOCIAL MEDIA has transformed the marketing landscape. Where print used to dominate, video content now reigns supreme, and for good reason. Through quick clips and informative reels, business owners can easily connect with their target audiences, convey their brand identities, and enhance their overall visibility. The key is creating eye-catching content that appeals to your customer base and makes them want to work with you. As you develop your video content, use these tips to ensure that each video provides value to bolster your marketing efforts.



## **Clarify your audience and goal**

Make sure you understand why you're posting video content in the first place. Consider your main objective: Are you looking to increase brand awareness, educate your audience, or drive sales? Your overarching goal will not only shape the style of your video productions but also influence where you publish them, the frequency of their creation, and the message they convey.

Also, as in any other area of business, it's important to know who your customer base is—only then can you effectively market your products or services to them. Before diving into video production, clarify your target audience so you can tailor your content to their specific preferences, interests, and needs. This will help your videos be more relatable, making them more impactful.

## **Prioritize quality**

When producing videos, ensure that your script, editing, lighting, and sound are all top-notch. If even just one area is lacking, your audience *will* notice and move on without another thought. A phone with a high-quality camera can

be sufficient for recording your videos, but from the get-go, you'll want to invest in a microphone and studio lighting to make your videos as audibly and visually appealing as possible. And always edit out unnecessary pauses and add graphics, music, and transitions to create polished and professional videos that hold your audience's attention and look meticulous.

A carefully crafted script can also go a long way toward improving the quality of a video, so rather than winging it, take the time to write a compelling narrative that engages viewers from start to finish. Try utilizing storytelling techniques to connect with your audience on an emotional level, which can help make your content more memorable. Or demonstrate why you're a thought leader in your industry by taking a deep dive into current trends. As recording videos starts to feel more natural, you can then try live videos to further engage with potential customers.

## **Follow best practices**

SEO isn't just for blog posts—it's equally valuable for videos. Since



over five hundred hours of video are uploaded every minute to YouTube alone, you need to make sure your content is discoverable. Use relevant keywords in your video titles, descriptions, and tags to help them appear in more searches, thereby attracting more potential customers and increasing your overall visibility.

However, to make people stop scrolling and click on your content, you'll also need to create a thumbnail that's eye-catching and gives an intriguing hint to what it's about.

Optimize your videos for conversions by including clear calls to action that guide your viewers on what



**Take  
Action**

Examine your current video marketing strategy, and consider how your organization may benefit from incorporating these tips into your future content.

to do next. Include links in the description to your current sales promotion, customer testimonials, or your main landing page, and ask people to follow or subscribe. And stay engaged with your audience and your content! Don't just post a video and never look at it again; instead, respond to comments, examine how well it is performing, and adjust your tactics as necessary. Remember that, in the end, a lot of marketing is trial and error, so don't fret if one video flops. You can always make another one tomorrow. ■



#### RISK REVIEW

Having a "heads-up" for all of life's potential risks would be ideal... but since the unexpected is, well, just that—proper risk provisions are **key to protecting your wealth.**

**WHEN THE SKY IS CLEAR, CARRY AN UMBRELLA.**

# For All of Life's Potential Risks, Carry Ample Provisions.

There are many situations that can jeopardize your financial future; identifying these risks is the first step in **protecting against them.** Let's discuss your risks, and structure a comprehensive strategy for your financial longevity.



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**Paul Sanders, Private Wealth Advisor**

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## Front of Tear Out Card 2



### THE MUSTS OF VIDEO MARKETING

Marketing videos like fun TikTok clips and informative Instagram reels can help you connect with your target audiences, convey your organization's brand identity, and enhance your overall visibility. Use the tips on this card to develop valuable video content.



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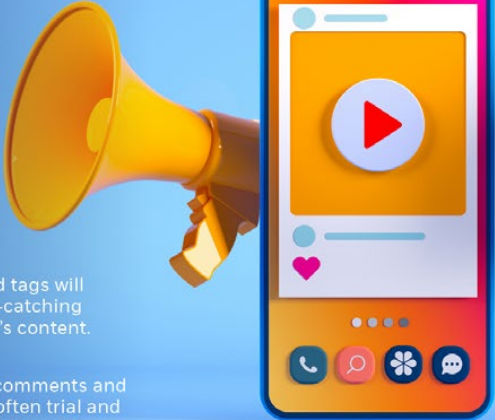
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## Back of Tear Out Card 2



- Clarify your audience**  
It's important to know who your customer base is—only then can you effectively tailor content to their needs and market your service or product to them.
- Prioritize quality**  
Record with a high-quality camera, a microphone, and studio lighting. Always edit out unnecessary pauses and add graphics, music, and transitions to create professional videos.
- Tell a compelling story**  
Use storytelling techniques to connect with your audience on an emotional level, even when sharing industry news. This will make your videos more engrossing and memorable.
- Follow best practices**  
Relevant keywords in video titles, descriptions, and tags will make them more discoverable. Also, create an eye-catching thumbnail that will stand out and hint at the video's content.
- Stay engaged**  
Check back on videos after posting to respond to comments and examine their performance. Marketing content is often trial and error, so if one video flops, adjust your tactics and try again!

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