

Networking to grow my personal and professional brand

**Presenter: Mark
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**An introduction to me,
your coach for a season**



Our journey together...



But I am a **consultant**
as well, which means that...



I am only ever 65 per cent correct

Workshop Overview

- Session 1 - An introduction to networking
- Session 2 - What do you have to offer?
- Session 3 - Networking tactics

The Power of Referrals to Grow Your Business



Two Referral Sources - Clients and Others

Session 2

What do you
have to offer?

...but please allow me to ask...

Who is your best client?

...and of course the answer is...

YOUR FIRM



Change

Competition: More and more people are bringing integrated solutions into the marketplace





WHY TECHNOLOGY IS SEEN AS A

THREAT

— AND WHY —

IT SHOULDN'T BE

A Look at You



Two Main Types of Referrer

1. Other Professionals

2. Clients



The Ladder of Your Success

1. Develop clear **niche capabilities**
2. **Up-skilling** - personal, business and service skills
3. Be good at present and future **focus** (guessing) - be known for being ahead of others
4. High client **visibility** - a core component of **personal service**
5. Be an **innovator**
6. Deliver **value** and on time - referrer should look for good feedback
7. Has a **meaningful** brand - both the firm and you

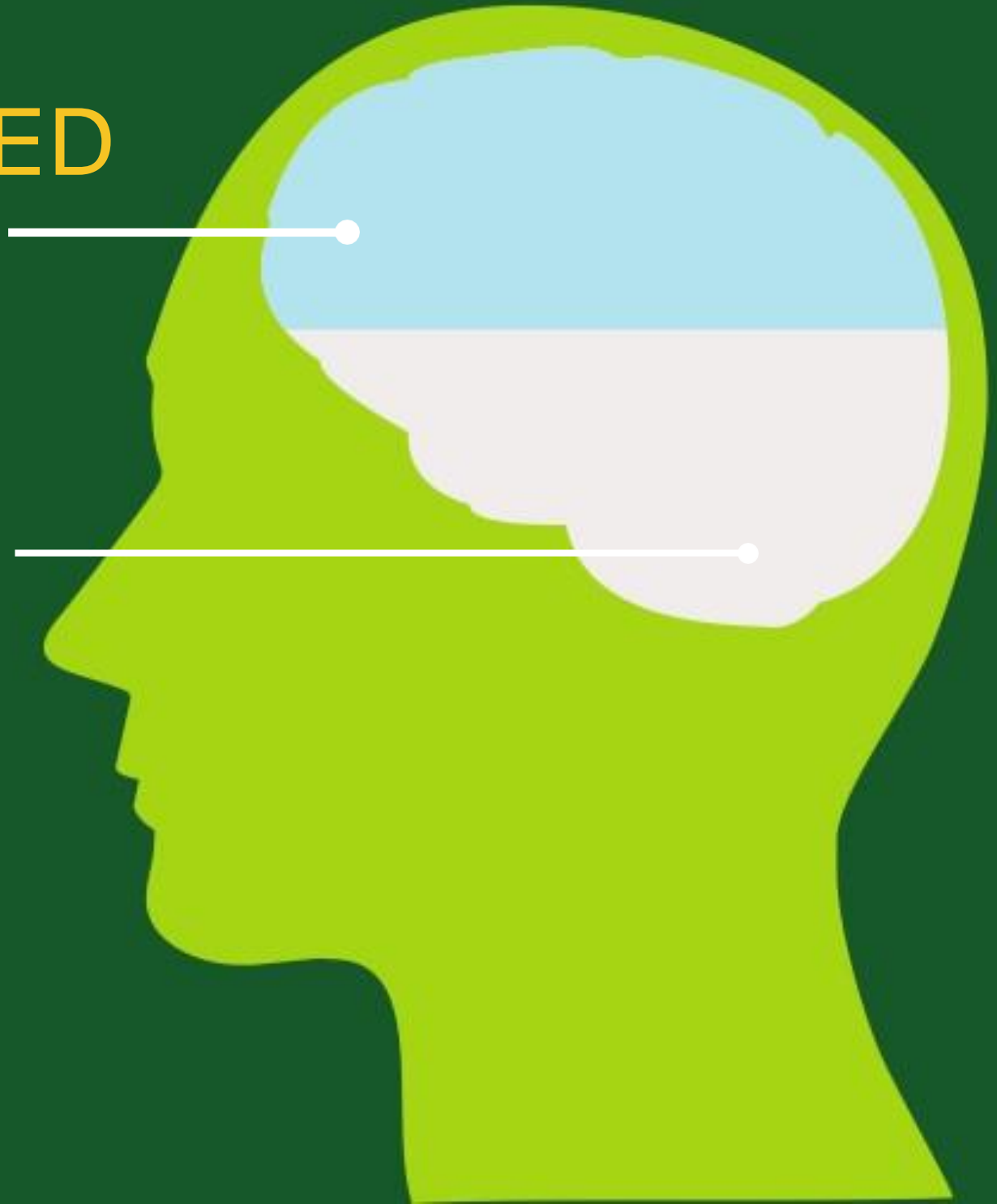


REMEMBERED

7%

NOT SAID

8%



Forward to Basics

The three **ingredients** for a successful accountant are to...

- Look **great**
- Sound **great**, and
- Be **great**

MICHAEL CARTER - PRACTICE PARADOX





We want clients to
sing our praises

Raving
Fans

Personal Bottom Line Survey

Maximising **visibility** with clients?

Setting and **achieving** targets for client meetings?

Networking strategy for other professionals?

Meeting Clients

A clients

2 compliance

1-2 non-compliance

B clients

After the year end and maybe **half before** the year end

C clients

Maybe **half** of them you will meet **once** a year?

Others

Two initial and **one** pre year end

Use a Meeting Agenda With Your Clients

Meeting Agenda : 30 November

- 1 What are your greatest challenges?
- 2 How do you feel about the business?
- 3 What does your profit forecast look like for the next year?
- 4 What feedback have you had from customers / clients?
- 5 How do you plan to develop the business?
- 6 -14 ... What can we do to assist?
- 15 **First Rule of Marketing:** “do you know anyone that you could introduce” or could you give me the names of anyone that you think would make a good client of the firm

Gain permission to advise. **Respect!**



Learn Some Great Questions

- ✓ Questions help you identify your client's low hanging fruit - ask the right questions and you will uncover gold
- ✓ Questions allow you to shake the trees and rake the leaves
- ✓ Your questions - make sure you look for the 'low hanging fruit'
- ✓ Questions are like seeds - plant them and they will grow
- ✓ Ask questions and then...listen. Once developed they can be priceless.
- ✓ Remember - it is not about giving clients a hydrant of ideas



Your Report Card - Raising the Bar

Timeliness

Reliability

Competence

Communication

Assurance

Tangibles

Responsiveness

Empathy



Projecting a High Quality Image

Your image – you and the firm

Your appearance

Clothing

Hairstyle

How you communicate - be careful about your use of humour

Your actions

Your firm

Your people



Personal Marketing Plan

Your personal marketing plan should comprise your own annual plan (broken down on a monthly basis) and include targets for activities such as:

- ✓ Marketing hours
- ✓ Marketing activities – suspects / prospects
- ✓ New [existing] client engagements
- ✓ New clients (no. / ZAR)
- ✓ Client meetings
- ✓ Referral meetings
- ✓ Personal development
- ✓ Your involvement in the community



A Look at The Firm



Definition of Marketing-that Includes Networking

Marketing comprises **all** those **activities** that enable you to identify **opportunities** to advance your **pursuit** of winning **new business**



Resource It:

- 3% gross
- 240 hours
- Be strategic
- Plan
- Communicate
- Involve
- Monitor



Power up your
marketing

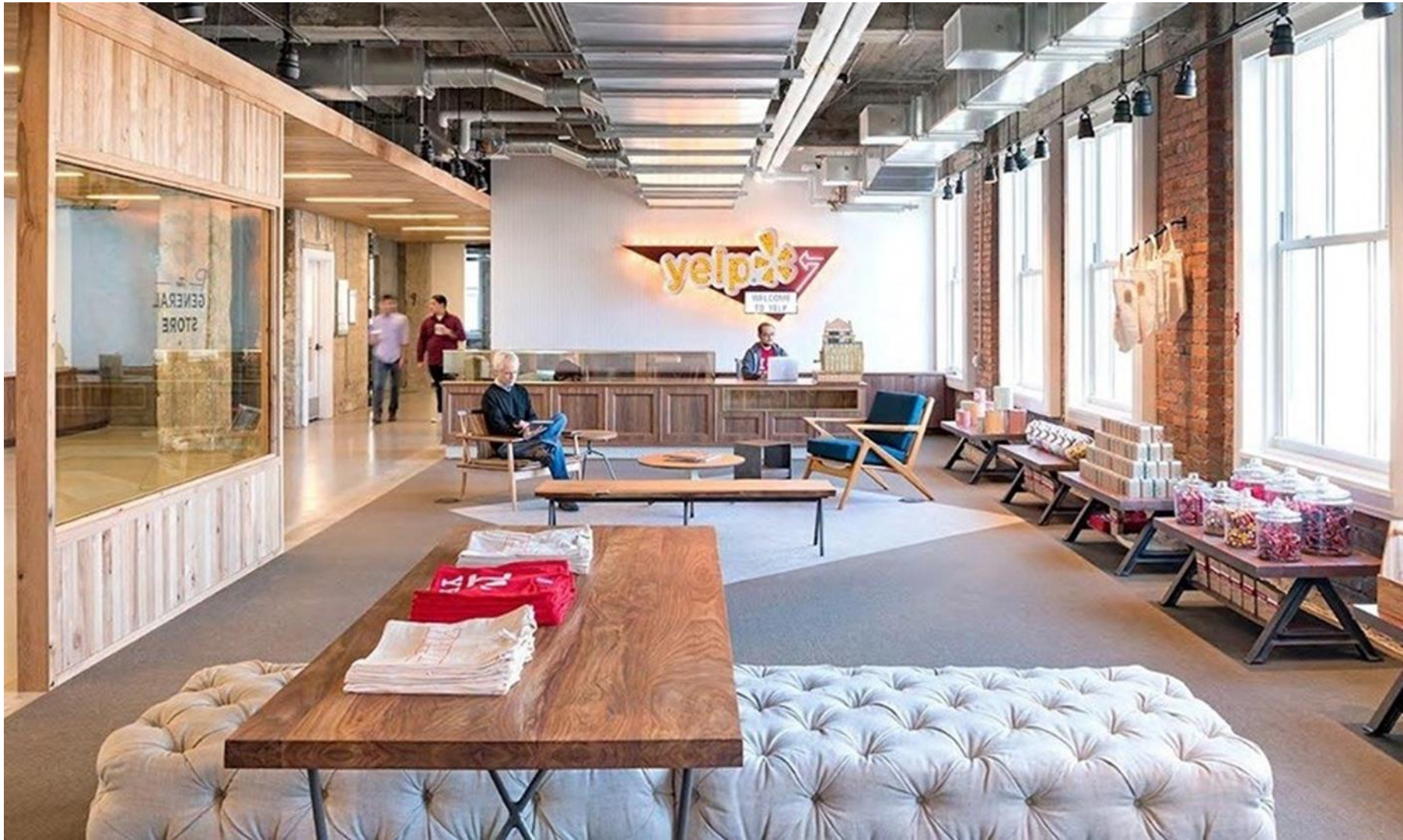
Cisco, San Francisco



Skopely, Culver City



Yelp - San Francisco



Note the coffee machine



The Big Mistake

Some firms train up their managers and sometime maybe a few years before they are due to become owner/partner they are told:

“All you need to do now is demonstrate you can win new business”

Session 3

Networking tactics

Your Referrals

For you

Your referrals

I recommend that **every** firm owner has a minimum of **six** professional referrals.

2 x Bank

2 x Financial services 2 x Legal

Others: Surveyor, Association CEOs, Chairpersons (Charity chairs) - those who have clients they could recommend

The results of surveying over 100 partners... The danger of having too many



The Game Plays Of Networking



Are You a Community Club Member?

Charities - can you serve on a Board?

Could the charity meet in your office?

Pro Bono policy?



[More] Networking Etiquette

- Arrive early
- Keep one hand free - the hand you shake with
- Limit your intake of alcohol
- Leave one person for another - Move around the room gracefully
- Avoid spending time with your colleagues
- Make eye contact with as many attendees as you can



Personal and Firm Marketing Tactics

Advisory literature:

An example of your services and a valuable souvenir In reception

In new client packs In your referral packs Client meetings Internal training

One [really important] firm advantage: Helps with consistent firm advice or position on a subject

Advisory literature creates opportunities that allow prospects to 'see' and 'taste' the services you can provide




Indoor golf

Personal and Firm Marketing Tactics

Lost clients - there may well be gold for you to mine in that last client list





Don't Give Up

While many accountants
I have met want and
expect to close at the
first meeting

Networking To Greater Success

Marketing To Your Clients

- Award clients **free** time. An hour with the client will most likely result in 5-10 hours work
- Ask: “How else can I help?”
- **Ask** for referrals” “Do you know anyone else who needs a great accountant?”
- **Recommend** your partners
- Hold a client **appreciation** event
- **Invite** them to firm events
- Invite them out **socially**
- **Train** staff to look out for Service Enhancement Opportunities

The end, Thank you very much