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Mixing It Up!

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## **Contact Resource List**

The following individuals have been instrumental in the inspiration that it took to create Elite Leads Business Development and the writing of this book. Please feel free to contact any of them for help with your business. They are the best:

Eve Abbott, Organizer Extraordinaire (510) 528-4950  
Deborah Bass, Diablo Funding (925) 838-6770  
Warren Boschin, Payroll Masters (925) 200-1975  
Jon Erlandson, Black Diamond Funding (925) 948-4100  
Jim Fagan, Advanced Business Development (925) 449-1925  
Robin Fahr, Fahr PR (925) 798-2910  
Jacqlyn Freitas, Speaker's Resources (510) 259-0060  
Ted Hayes, Leasing Associates (925) 947-6661  
Jim Horan, One Page Business Plan (510) 222-0805  
Neil Kripalani, Employee Leasing Group (925) 485-9875  
Alice Kwong, Wonderland Graphics (925) 798-0441  
Carol Levy, Bay Area Speak (510) 655-9494  
Clint Rood, Clientele Telecommunications, (915) 254-9443  
Jeff Rubin, Put It In Writing (925) 724-9507  
Rebecca Shaw, Entrepreneurs Editor (510) 849-4334  
Ed Thorpe, Mr Postcard (925) 837-7849  
Brad Warren, Warren & Associates (510) 537-0107  
Evern Williams, Telecommunications (808) 539-3914

## Mixing It Up!

*Twenty years from now you will be more disappointed by the things that you didn't do than by the ones you did do."*  
-Mark Twain

- Chapter 19 -

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### **Own Your Own Lead Group**

The success of Elite Leads has inspired the expansion through a franchise. If you live in an area where there are 250,000 people and/or 60,000 businesses, I would enjoy having the opportunity to talk to you about creating a territory in your area.

If you or anyone you know has the entrepreneurial spirit and currently working as a sales consultant in any capacity, I like to hear from you. The process involves facilitating meetings and marketing to other entrepreneurs.

Our website contains all the details, with our contact information. <http://www.eliteleads.com/bizop.htm>.

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## Mixing It Up!

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The Entrepreneur's New Testament.

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Why Power Partners Create Success.

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## Sharyn Abbott

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## Mixing It Up!

Stapler

Velcro

White Chipboard

### **Miscellaneous Entrepreneur Resources**

#### Franchise Kit

Do-it-Yourself kit with all California requirements. Fax for more information (704) 743-1799

#### Entrepreneur PR

A public relations agency for the startup and homebased business set. Search their copyright-free articles database for other small-business news items. [www.iconpub.com](http://www.iconpub.com)

#### Human Resources

Employee resources including policy agreements, benefits and health and safety materials  
<http://www.bcentral.com/directory/hr.html>

### **Author's Note**

If you know of or discover other resources, I would enjoy hearing from you.

[sharyn@eliteleads.com](mailto:sharyn@eliteleads.com)

Sharyn Abbott

1630 N Main St. #439

Walnut Creek, CA 94596

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*Wonderland Graphics, Walnut Creek, CA*

*Editing by:*

*Rebecca Salome,*

*Entrepreneurial Authors, Berkeley, CA*

*Carol Levy,*

*The Hired Pen, Oakland, CA*

- Advertising Specialty Item
- Flowers
- Candy
- Candy Bowl
- Raffle Prize
- Sign
- Small Boxes to create raised effect
- Table Decorations including cloths
- Tool Box
  - Adhesive
  - Balloons
  - Brochure racks
  - Camera
  - Cash box
  - Clear packing tape
  - Cleaning rag
  - Clip board
  - Credit card forms
  - Extension cord
  - Hammer
  - Handiwipes
  - Needle and thread
  - Paper clips
  - Pens, pencils and felt tip markers
  - Receipt book
  - Rubber bands
  - Safety pins
  - Scissors and Exacto knife
  - Scotch tape
  - Shoe buffer
  - Spring clips
  - String

## Mixing It Up!

Linda Chappo and Tom Marcoux  
(415) 826-1409

Women's Business Alliance

12-1:30 1st and 3rd Wednesdays, The Left Bank,

Larkspur Dr. Debra Condren,

Founder and Director (415) 459-7112

email: DrDebraC@aol.commai

lto:DrDebraC@aol.com

<http://www.7-52.com/wboa.htm>

### **Goal Setting**

Zig Ziglar who is known for inspiring motivation, says that goals require seven steps:

- Identify the goals;
- Specify a deadline;
- List the obstacles;
- Identify the people or groups that will help you accomplish the goals;
- Establish the skills and knowledge it will take;
- Have a plan of action and
- List the benefits you will realize when you've accomplished your goals.

### **Trade Shows**

Keep this list handy for the trade shows you'll want to participate in:

- Flyers
- Brochures
- Questionnaire
- Business Cards
- Business Card Dispenser/Display
- Bowl to collect cards

### **Dedicated to my loyal Elite Leads members**

*Your support and friendship have been the catalyst.*

---

### **To Tom Chavez**

*Thank you for the inspiration  
and for providing the vehicle!*

Small Business Development Centers

Napoleon Britt, 519 17th Street, Oakland, CA  
510 893-4114

Beverly Hamel, 2215 Bisso Lane, Concord, CA  
94520 925 646-5088

Speaker's News

For information preview their website:

<http://www.speakernet.org>

Speaker's Agent, Carol Levy, Bay Area Speakers,  
510 655-9494

Spirituality in the Law

5:30pm 3rd Tues Brian Ripley; 465 California  
St, #1222, San Francisco, CA 94104.  
415 956-1908.

Technology

<http://www.technoakland.com>

Tri-Valley Human Resources Association

11:30 Luncheon, 3rd Tuesday, Faz Restaurant,  
5115 Hopyard Road, Pleasanton (510) 460-8800  
RSVP Janet Bogen (510) 244-5425 ext 2, \$16  
Members, \$21 Non-Members

Tri-Valley Convention & Visitor's Bureau

Quarterly Mixers (925) 846-8910  
<http://www.trivalleycvb.com>

UC Berkeley's Entrepreneurial Forum

The forum meets at the Haas School of Business, generally the 4th Thursday at 6:00  
<http://www.haas.berkeley.edu/lester> or  
call (510) 642-4255.

West Coast Business Academy

Sponsors workshops for entrepreneurs.



## Mixing It Up!

NCSAE-Northern California Society of Association Executives (415) 764-4042 [www.ncsae.org](http://www.ncsae.org)  
National <http://www.asaenet.org>  
Northern California Human Resources Charter (415) 291-1922 - \$20 Members, \$25 Non  
Northern California Society of Association Executives 6:30pm; 3rd Wednesdays; Monthly meetings of Association Executives (415) 764-4942  
NOW -National Association of Women  
Helen Grieco, President 415 457-3575  
<http://www.canbw.org>  
PIA-Providers of Insurance Agents  
<http://www.pianet.com>  
Rotary International  
<http://www.rotary.org>  
San Francisco Chapter of the Bay Area Cash Flow Association 12pm-4pm 2nd Sat; Randy Norris 925 830-9451; San Ramon Library  
San Francisco Convention & Visitors Bureau  
Mixers on the odd Month (415) 974-6900  
Small Business Administration  
The largest small business lobbying organization, more than 600,000 members voice their concern to government. (615) 872-5800  
Small Business Administration - San Francisco  
455 Market Street, 6th Fl (415) 744-6502  
Small Business Council of America  
This organization seeks to prevent federal tax laws from overburdening small business owners. Members work together to support legislation to create important economic incentives. (301) 656-7603.

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Tracking Systems	57	6:30 2nd Thursday, Carla Cobb Davis, Executive Director (408) 268-8508
Storing Cards	58	<a href="http://www.nawbo.org/nawbo/nawbostart.nsf">http://www.nawbo.org/nawbo/nawbostart.nsf</a>
Converting Contacts	58	National Business League (NBL)
<b>7. Legendary Leads Groups</b>	61	Currently 127 chapters across the U.S., (202) 737-4430
The Right Stuff	63	<a href="http://www.thenbl.com">http://www.thenbl.com</a>
Preparation	64	NAEA-National Association of Enrolled Agents
Impressions	65	Meetings for accountants and bookkeepers
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Defining Etiquette	76	Meetings for investment advisors
Who's First	77	<a href="http://www.nasd.com">http://www.nasd.com</a>
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Voice Mail	80	<a href="http://www.humanresources.org">http://www.humanresources.org</a>
Answering the Call	81	NSA/NC-National Speakers Association, Northern California Chapter
Be Prompt	81	Through education and community, quality and professionalism in both speaking and business development, it is a platform for speaking. Cecilia MacDonald (916) 965-6566
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International Assn of Business Communicators	Getting Rid of Clutter	94
8:30 am, Monthly Roundtable, 2nd Thursday,	Make it Easy	95
44 Montgomery St 39th Floor - SF, Francis	Sales Ratio	96
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## Organizations

Most of these organizations are located in the Bay Area, but I believe it will give you some creative ideas on how you can find groups in your area.

American Business Women's Association

[www.finch.com/swabwa](http://www.finch.com/swabwa) - Bay Area

National website: <http://www.abwahq.org>

Asian Business Association

San Francisco -Tom Chin (415) 285-6872

Asian Business League

Doris Chew, Director (415) 788-4664

ASTD - Association of Training and Development

<http://www.astd.org>

Bay Area Angels

5:45 3rd Thursday; Spinnaker, Berkeley <http://www.bayangels.com>

Bay Area Speaker's Service

8:30 am, Monthly Speaker's Professional

Development; Carlyn Williams (510) 277-8277

Bay Area Integrated Marketing

<http://www.baim.com> Contact Michael Savod

Chief Executive Officer Club

San Francisco Bay Area

Jack London Square

Hank James (925) 934-3072.

Commonwealth Club

Meetings are in various areas, call (415) 597-6700

<http://www.commonwealthclub.org>

Contra Costa Council

An economic force for the county dedicated to develop and retain businesses. (925) 944-8975 or check out their site [www.cccouncil.org](http://www.cccouncil.org)

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Ali Lassen's Leads Club

<http://www.leadsclub.com/>

Business Network International

<http://www.bninet.com>

Elite Leads Business Development

<http://www.eliteleads.com>

Leads Club

<http://www.ocnow.com>

LeTip International

<http://www.letip.com>

### **Leadicious Rules**

Good networkers are few and far between. If you would like to stand out in the crowd, follow my Leadicious Rules and you will experience rewards beyond your wildest imagination:

**L**earn member's Power Partners

**E**ducate the members about your business

**A**sk for referrals

**D**eliver steller presentations

**I**nstigate coffee meetings

**C**ultivate Preferred Power Partners

**I**mmediately follow-up on your leads

**O**ffer your contacts freely

**U**tilize every resource you find

**S**how your appreciation by thanking them 3 times

**R**emember to always be prompt

**U**nderestimate what you can deliver

**L**ead with a thought-provoking introduction

**E**xpect success

**S**ave the best for last!

*"We are nothing, without friends."*

-Anonymous

---

## **Acknowledgments**

Writing this book took more discipline than I had anticipated. I had to force myself to ignore distractions like email, the beautiful green hills of Walnut Creek, or another tea break. It wouldn't have been possible without the support of many people whose help I appreciate deeply.

Ed Thorpe has been my mirror and mentor since we met at a Chamber of Commerce group in 1990. A year later he encouraged me to begin a private leads group. He always tells people that for the first two years I would say, "It's all his fault!" Now he's willing to acknowledge my gratitude that because of him, I have the largest privately

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owned and facilitated leads group in Northern California.

My appreciation of Warren Boschin is far from any less than that of Ed. Throughout the years he has been my sounding board and support system. His limitless friendship is has meant the world to me.

Jacqlyn Freitas, with her gentle ways and her class on “How to Write a Book in Two Weeks or Less” became an incredible inspiration.

I took Jackie’s class prior to having a conversation with Jim Horan, who gave me the focus that I required to begin writing this book. His thoughtfulness made it possible for me to take my concepts out in the world. I greatly appreciate this catalyst. Without Jim’s generous introduction to Tom Chavez, I can’t imagine how long it would have taken me to finally commit these words to paper.

In addition, there are two others who held my hand during the midnight hours. They sat with me and helped put the final touches on this book. Pat Sullivan and Jaclyn Zoccoli never once questioned the time or the energy they spent when they gave their guidance.

And then Jim Fagan offered to help do the final proofs, not once, twice, but three times. That’s true friendship. Jim works the same way with his clients, above and beyond any reasonable assemblage of duty to make sure the job is done right. Thanks Jim, for all that you do.

Then, at the midnight hour, Carol Levy, master of words and wizard in the artistry of writing, appeared to rescue me and make this book more cohesive.

### **Photography**

Framing  
Portrait  
Product

### **Personnel**

Placement Sales  
Placement Permanent  
Placement Temporary  
Testing  
Skills Evaluation

### **Training**

Animal  
Corporate  
Computer  
Internet  
Language  
Personal Fitness  
Speakers

### **Transportation**

Airport Services  
Limousine  
Planning Services

### **Travel**

Corporate  
Incentives  
Leisure

### **Videographer**

Duplication  
Events  
Marketing Material

### **Welcome Service**

### **Writing**

Author  
Brochures  
Newsletter  
Technical

## **Professional Leads Organizations**

I personally don’t believe you can join enough leads groups. However, most of the groups have a hostage clause, where once you join that organization they prohibit you from joining any other.

Each group is structured slightly differently and you’ll find that you might respond better to one over another, either because of the structure, the industries that are represented or because of the membership. Choose the group(s) that are suitable for you and your needs.

This is only a sampling as I’m sure you’ll discover in your search. There are more than any one person can manage to attend.

## Mixing It Up!

Printer	Retirement
Cartridge Replenishing	Planning
Repair	Services
Printing	Secretarial Service
4-Color Post Cards	Data Transfer
Business Forms	Typing Service
Corporate Image	Word Processing
Desktop Publishing	Security Systems
Digital Imaging	Commercial
Engraving	Residential
Graphic Design	Seminars
Personalized Materials	Approach
Publisher	Investment
Products	Motivational
Environmental	Sales
Health	Sign Maker
Import/Export	Exterior
Maintenance Supplies	Interior
Paper	Speakers
Surplus Goods	Bureau
Property	Motivational
Manager	Representation
Real Estate	Telecommunications
Commercial	Cellular
Investments	Equipment
Residential	Long Distance
Recruiting	Pagers
Accounting	Pay Phones
Food Industry	Phone Card/prepaid
Research	Virtual Office
Health	Voice Mail
Investigative	Telemarketing

Long before this book was ever envisioned, many people took time from their lives to encourage and support me, even when I had no idea where I was headed. Hundreds of people have kept me going with a few words of encouragement, a hug, or an understanding smile.

During my high school days, several teachers saw something in me that others, including myself, had overlooked. I'd like to honor them with the credit they deserve tenfold.

Mrs. Marium Pendleton, with her sweet loving nature, helped me through one of the most traumatic experiences in my life.

Instead of turning her back and looking the other way, Mrs. Margaret McKennon took the risk and supported me when I needed it the most.

For six years, Mr. Robert Davidson guided me through music. He was tireless when it came to teaching, and his work has provided me immense joy and serenity throughout my life.

Mr. Bill Larkin, my algebra teacher and principal, gave me enough free reign to expand the potential of who I could be. He encouraged me to learn to have the confidence to express myself.

Mr. Bill Mieskie coerced me into participating in speech class and allowed me to do extra book reports to improve my grade point average. He didn't know it, but he opened the door to a world that started the road to overcoming many fears.

And finally, dear caring Mrs. Dee Lemos, who kept me after school the year I turned 15, helped me overcome years of painful stuttering.

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Cash Flow Analysis  
College  
Construction Distribution  
Factoring  
Financial Aid-Student  
Lines of Credit  
Mortgage Seconds  
SBA Loans  
Venture Capital  
Viaticle  
**Furniture**  
Rental  
Sales  
**Gifting**  
Baskets  
Corporate & Personal  
Corporate Incentive  
**Health**  
Chiropractor  
Hypnotherapist  
Massage Therapy  
**Home Services**  
Landscape Architect  
Tree Service  
**Insurance**  
Business  
Dental  
Disability  
Financial  
Health  
Investment  
Life  
Cash Flow Analysis  
Property Causality  
Title  
**Internet**  
Cabling  
Service Provider  
Site Design  
Sound Design  
Training  
Wireless Access  
**Investments**  
Property  
Stocks  
**Janitorial Services**  
Carpet Cleaning  
Window Cleaning  
**Leasing**  
Automobile  
Commercial Property  
Equipment  
**Mailing**  
Service  
Media  
Audio Tape Producer  
Audio Visual  
Radio Program  
**Mover**  
Commercial  
Residential  
**Organizations**  
**Personal Services**  
Flower Arrangements



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Technology License	<b>Counseling</b>
Turn-Around Specialist	Psychology
<b>Caterer</b>	Marriage & Family
Events	<b>Design</b>
<b>Coach</b>	Interior-Commercial
Business	Interior-Residential
Executive	Office Space
Personnel	Window Treatment
<b>Computer</b>	<b>Education</b>
Systems Design	<b>Employee</b>
Network Equipment	Benefits
Software Design	Leasing
<b>Construction</b>	Outplacement Service
Architect	Verification
Building Trade	<b>Entertainment</b>
General Contractor	Clown
<b>Consultant</b>	DJ
Business	Musician
Career Development	<b>Equipment</b>
Conflict Resolution	Multi-Media
Environmental	Office
Exhibit Display	Presentation
Human Resources	<b>Event Planners</b>
Image	<b>Facility</b>
Import/Export	Coordinator
Information Mgmt	Environmental
Management	Fitness Training
Marketing	Incubator
Presentation Skills	Meeting Rooms
Publicist	Retirement
Small Business	<b>Funding</b>
Workplace Strategies	Angel

*“What we call the beginning is often the end.  
And to make an end is to make a beginning;  
the end is where we start.”*

-T. S. Eliot

---

## Author's Preface

For nine years, I have worked with over 1,500 businesses. At least 90% of them are still in business doing what they intended to do after a five-year period. The national average for new businesses to succeed is 10% according to the Internal Revenue Service.

The Internal Revenue Service reports that 90,000 of the 100,000 homebased businesses that start up in this country every single month will fail in their first five years. Why then are my clients nine times more likely to succeed as the average new business owner is?

The formula is simple. They are connected in the

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community. They work with Power Partners, one of the most incredible methods of connecting professionals in the community, which is one of the foundations for this book. Through the connections they build with other companies, they generate business leads and gain management assistance that's not otherwise available.

The main reason most new businesses fail is a lack of sound management and effective marketing — not location, lack of capital or the inability to accomplish all the tasks that are required of entrepreneurs.

Too many start-ups begin with an unclear vision. Some were created too quickly because employees didn't know what else to do after they were downsized. Other would-be entrepreneurs began with a longing to become one of the eight people in this country who actually enjoy their work. Many failed start-ups don't realize that they chose the wrong business or that they're not well enough equipped to manage their business until they've depleted their life savings and all the equity in their homes.

I'm telling you these harsh realities not because I want to discourage you from starting a business, but if you want to own a business, it is my wish that this information will serve to help your business flourish.

The number one way that small businesses can thrive is networking, or as the title of this book says, "Mixing It Up!" Get out into the world and find your customers. While you're connecting with potential customers, you'll also become customers of people who can help you have more fun while making more money. You'll find people with the experience you lack and people who are happy to benefit from what you know.

Everything that's presented in this book is practi-

## Power Partners

This Power Partner List is designed to show you the industry and then the category within the industry. Use the list to develop strategic Power Partners to whom you can refer business to on a reciprocal basis.

### Accounting

CPA  
Bookkeeper  
Payroll Services  
Tax Practitioner

### Advertising

Direct Mail  
Radio  
Specialties  
Television

### Apparel

Women's Attire

### Artist

Craft  
Fine

### Attorney

Business  
Civil Litigation  
Estate Planning  
Family Law  
Labor Law  
Living Trust  
Real Estate  
Tax Specialist

### Auditing

Business Utilities  
Leases

### Automobile

Repair  
Sales  
Washing

### Banking

Business

### Broker

Business  
Mortgage

### Business Services

Answering Service  
Barter Service  
Billing Service  
Check Systems  
Collection Service  
Corporate Relocation  
Credit Card Systems  
Data Storage  
Expense Reduction  
Greeting Cards  
Organizer  
Message on Hold  
Notary  
Plant Management  
Private Investigator  
Information Protection  
Procurement

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questions to ask before you walk into a group's event for the first time.

- What is the purpose of the organization and this specific event?
- Is this function a special event or an ongoing one? If ongoing, how long have you held this kind of function?
- Who are the usual attendees?
- What is the parking situation?
- Are you serving food and beverages?
- What does it cost to be part of this organization?

### **Creating Favorable First Impressions**

People develop their first impression of you in many ways, but there is nothing as permanent as the physical impression you create.

- Walk into a room with confidence
- Wear professional attire
- Choose colors that blend with your own coloring
- Check your hair
- Check your makeup
- Practice your handshake
- Wear your professionally made name badge on your right shoulder
- Have plenty of business cards
- Have a positive attitude
- You are sincere
- Practice your introduction
- Remind yourself to listen intently to others

cal. It all comes from direct business experience or the experience of people I trust. Much of it comes from *trial by error*, starting with the trepidation of the first networking event I ever attended, to the fulfillment of a business that's far more rewarding than anything I ever could have imagined creating.

Specifically, I want to show you how to:

- position yourself just as well as big companies with mega-budgets for marketing and public relations;
- learn the easiest and most enjoyable way to market your venture;
- think creatively;
- step aside and view your business objectively;
- develop the habit of following through on business leads and ideas;
- feel comfortable networking and following business leads;
- create a better quality of life for yourself and others.

To be an entrepreneur you must be:

- self-disciplined
- driven beyond reason
- goal oriented
- success minded
- stick-tuitiveness and more hours in a day than the average individual, then this book will help you realize a few shortcuts to achieving that dream.

There's no greater joy than owning a successful business. I hope that this book will help lead you to many business successes with grace and distinction.

*“Destiny is not a matter of chance, but of choice, not something to wish for, but to attain.”*  
-William Jennings Bryan

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## **Lists**

I’ve provided several lists for you that you can copy and easily refer to when you’re planning on attending a mixer or a lead group.

If you use the list, you will find that you will be more focused on the intended purpose of attending these functions, and less concerned about what others will be thinking of you.

### **Research Before Attending**

The more you know about an event and the organizers, the more effective it will be for you. Here are some

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end in sight. Look for why you select what you are doing. Think it through. It is not enough to simply be in business to earn a living. Those who follow their heart are the happiest by far.

My wish for you is that you blow out your candles on your 100th birthday and tell your great, great-grand children about the choices that you made in your life that lead you to complete fulfillment.

In the years to come, if I have inspired you in any way, please let me know. We all live for the affirmations and your success would be the greatest affirmation of all.

Thank you for sharing the adventure!

*“The only thing we have to fear is fear itself.”*

-Franklin D. Roosevelt

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## **Fear Inspired Creativity**

If I hadn't overcome my fear of strangers and learned how to be effective at networking, my travel business would have experienced a rapid death.

When I bought a travel business in May 1990, I thought it was capable of creating more than its average sales volume of \$40,000 per month. For the next four months, I pushed my staff and myself to diligently apply what I had learned from a prior career in corporate sales.

Our hard work quickly paid off. Less than four months later sales had increased to \$90,000 a month. Then the travel industry crashed! Our Navy sent ships to the

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Persian Gulf. Rumors of war abroad and threats of terrorism at home caused people everywhere to cancel cruises and airline reservations. Within a month, our agency sales dropped to \$30,000 a month.

When I purchased my travel agency in 1990, I joined the Chamber of Commerce only because I believed it was a logical civic obligation. I had no idea at first that membership offered great benefits to those who were willing to participate.

When people suggested I attend a Chamber mixer, I shuddered to think of having to walk into a room filled with 200-plus savvy business owners. My shyness and complete introversion sent me into a major panic. Unlike my personable brother Tony who possesses the innate ability to have something to say to everyone, as well as knowing how to make them feel comfortable, I would have preferred to spend my time behind a computer.

I put off the dreaded event as long as I could. An acquaintance persuaded me to meet him at a mixer. After I found the location, I drove around the block three times before I found a parking space. "Being late is not a great way to make a good first impression," I berated myself.

Catching a glimpse of myself in a storefront window gave me a bit of courage. I was wearing a beautiful abstract-designed jacket I had found in a little boutique just off Market Street in San Francisco. Though it was a little brighter than most people would be comfortable wearing to a business meeting, on this cool fall evening it reminded me of the cheerfulness of springtime.

I tried my best to be cheerful and positive. "Okay," I coached myself, "ready, set, walk through the door. And please let me get through this without too much difficulty!"

*"Be true to your work, your word, and your friend."*  
-Henry David Thoreau

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## It's a Wrap

I've included a great deal of information in this short amount of space. I wanted to offer entrepreneurs a guide to make it easier for them to get through the maze of starting a business.

My resources, although often unconventional, are tried and true. I believe that the more effort you spend on developing your individual message, the more you will stand out in the crowd.

After all, isn't that worth the recognition you'll acquire?

Whatever path you choose, take each step with the

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Three middle-aged women sat at the front table taking money, writing name badges and selling raffle tickets. "It's five dollars for guests," said one of them in an indifferent voice as I approached.

I dug through my purse to find my wallet. Handing the five-dollar bill to the first woman, I squinted to read her name badge. "Alice, do you know George?" I asked in a shaky voice.

Alice looked up and smiled warmly. "Sure, he checked in a few minutes ago!" She pointed around the corner.

"Wait!" the lady sitting next to Alice shouted. "You have to have a name badge! What's your name?"

"Oh, Sharyn, with a 'y' instead of an 'o'."

As though she had no idea how important my name badge was, she quickly scribbled my name, as instructed, although it was more than slightly downhill, with the 'n' nearly off the edge.

Oh well, if she wrote my name badge, she probably wrote everyone else's too. They'll probably all look the same.

I stood three feet inside the doorway for a full five minutes. George, who at 6'2" generally stands out in a crowd, was nowhere in sight. Neither was anyone else I knew.

"Maybe I should just go home," I thought. "Being here really isn't such a good idea."

"There you are!" George called from behind me.

"Sorry, I had trouble finding a parking place."

"I know, that's why I always arrive early," he offered.

"There must be two hundred people here!"

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“Come on, let me introduce you to some of them!”

He did, and though neither of us knew it, that night would forever change my life.

That first networking event proved that I could get through it and walk away with unbelievably great contacts. Each time I attended a mixer, it became easier than the previous time.

After a few months, someone invited me to a leads group. At the very first meeting, I met someone who knew about an environmental firm with 26 employees who frequently traveled throughout the country. The minute I got back to the agency, I called my lead and within a week began to book all of their travel, which was about \$20,000 a month.

I realized that the two hours that it took to meet with the firm would generate more business than 20 hours of my usual marketing. I didn't have to be told twice that networking was my ticket to staying in business. I never missed a meeting, even though it was at 7:15 in the morning. Within months, the agency was generating \$85,000 a month in sales.

Then the Gulf War actually broke out, and the monthly sales dropped back down to \$40,000. Many travel agents never recovered from this second assault to the travel industry. About 20% of area agencies were out of business within two years.

I joined every organization I found. I volunteered at the Chamber of Commerces. I became part of the Board of Directors for a number of nonprofit organizations. Eventually I was at a networking function or meeting five days a week, often twice a day. By the time I sold my business in 1992, it was generating \$185,000 a month.

as if you own it, then practice your best manners while you get to meet some people before your presentation.

When your talk is over, stand there and enjoy your applause. Don't turn to leave the stage immediately. Look over the audience, smile, then sit down and relax while the meeting continues. That way you'll be ready for the some of the best mixing and mingling you've ever seen.

This time you won't have to worry about who you'll approach. When you're the speaker, they'll always come to you!



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ence Unlimited. She quoted me as saying, “The bad news is you have no job, but the good news is, you can do anything you want with the rest of your life. What are you going to do to make it count?”

She went on to say that with that thought in mind, she went back to school and ended up getting a job in sales where she was now making more than three times what she had been earning previously.

As you might imagine, I felt as though I was walking ten feet above the ground the rest of evening and for at least another week. It's very empowering to know that I made that much of an impact on someone who was part of a group with whom I had spent only an hour.

You can get on the road to effective public speaking right now. Check your local phone book for a Toastmasters group. As soon as you find out when local meetings are held, schedule a meeting into your life. Don't worry if you don't know a topic or great title; they will help you with the initial topics. That's just one of the things you can learn there.

Also look for other speaking organizations like the National Speakers Association. Mingle with as many people as you can find that make speaking a regular proponent of their business development plan. Check out one of the many great books on speaking from the library.

When you do go out to speak, don't forget all you've learned about *Mixing It Up!* in other public settings. Fill your business card case with clean cards and your briefcase with your brochures or other marketing materials.

Put on your best outfit; practice all the little tricks you've learned to turn nervousness into courage and bad attitudes into good ones. Walk confidently into the room

Over the years, I've learned that good networkers average one new client for every 20 contacts. My ratio was one client for every five leads.

Most entrepreneurs miss out on the benefits of networking because they have no idea of the benefits of the events. They might know logically that networking can pay high dividends, but they fall short of pursuing productive groups. Or they're afraid they won't know what to say when they walk into a room full of strangers.

I understand both the lack of knowledge and the fear. When I grew up in Mendocino, California, this picturesque ocean front town had less than 1,200 people in a radius of ten miles. It was rare if we met more than three or four new people within a year.

Since I was in a small community where everybody felt safe, meeting new people was frightening, especially because I stuttered which made me self-conscious.

I was completely unprepared for being in business in the densely populated San Francisco Bay Area, which supports about eight million people.

I discovered that whenever I have the courage to face the fear in any situation, it serves to dispel a previous belief system that prevented me from realizing my potential.

Some of my self-doubt came from not valuing my life experiences or simply from a lack of experience in being with people I didn't know. Although I occasionally still get nervous when meeting new people, I am amazed at how strangers can become supportive allies.

Attending functions and helping people connect with each other has become a way of life. Now I get to enjoy watching others turn that fear into an exciting opportunity to make new friends and build their businesses.

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knowing when you're moving toward your purpose and when you're off-course. Once you learn the skill of speaking, you can take it into any arena.

It won't take long for the joy of speaking to break through the sense of fear. The first time you experience this joy, you may be surprised at how incredibly empowering it is to be able to command your audience's attention and inspire them to take action based on your recommendations. They'll seek your advice and want to get close enough to share your business savvy.

The process of public speaking is the fastest method of gaining effective professional acceptance that I am aware of. For example, based on the national average, you'll turn one of 20 potential prospects into a client. If you speak in front of a group of 40 prospects, the odds are that you'd net at least two new clients.

The process of speaking to these 40 people might take you two to three hours, including setting up the talk, speaking, getting there and back again. How long would it take you to dial 40 new prospects, play phone tag a few times, and then actually talk with them?

The fact is, people who hear you speak publicly are much more likely to be impressed and inclined to hear your message than any forty people you call individually!

Over the years, I have talked with well over a hundred thousand individuals. At this point, I can go nearly anywhere and meet someone who has already heard me speak. It's great to experience that level of recognition.

While I was at the San Francisco Visitors and Convention Bureau's mixer last year, a lady approached me. She told me that she had heard me speak three years prior at a professional organization for job seekers called Experi-

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laid my hand gently on the snoring member's arm. He immediately jerked awake and looked around the room at all the smiling faces.

I leaned in close to him and asked, "Would you like to join us?"

Everyone, including the man who was snoring, had a good laugh.

The moment turned magic. I gained their respect because of the way I handled the situation.

From that moment on, I have never let my nervousness distract me from the purpose of inspiring and informing a group. When unforeseen situations occur, I work with them instead of resisting them.

### **Fear of Speaking**

Because so much of the public fears public speaking, great benefits are accorded to those who dare to get up in front of an audience and speak. Audiences tend to believe that those who speak publicly about their industry are more knowledgeable than those who don't speak publicly are. Speakers command more respect. The audience is more likely to want to do business with the speaker than nearly anyone else that they know in the same industry is.

So, if you're willing to speak about your profession, what you know and what inspires you, you'll move farther ahead of your peers in terms of gaining notoriety and being highly regarded.

The only way to break the fear of public speaking is to do it. Like learning to ride a bicycle, before you get competent, you'll probably fall a lot. You may even fall a time or two after you become an expert, but you learn to make it work for you. You'll develop your instincts for

*"There are no mistakes, no coincidences. All events are blessings given to us to learn from."*

-Elizabeth Kubler-Ross

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## **Finding and Choosing Events**

If you're not Mixing it Up! and find it is challenging to find events, with a little research, you can find business functions that will welcome you five days a week and occasionally on weekends. When you do a little more research, you will easily find ten times more events than you will have time to attend!

### **Chamber of Commerce Events**

When I first joined the Chamber of Commerce, I waited six months to attend my first function, a mixer that would draw one to two hundred other business members.

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After I got over my initial trepidation, I discovered that the major benefit to being in the Chamber is visibility. Chamber members are generally the most active members of the community. Many politicians began their career by being involved in their local chambers.

Participating in your local Chamber of Commerce is a great way to keep up with what is going on in the community. You'll find it easier to plan your business as you learn through Chamber events which companies are expanding, moving into the community, or downsizing.

Most chamber events are open to guests as well as members. Call your local chamber and ask for a calendar of events. They'll usually invite you to come down to the chamber offices and discuss the benefits of membership. Even if you're not ready to join the chamber, by all means go. That way, when you go to your first chamber event, you'll know at least one other person. Odds are that this person will know several people you should meet and he or she will be glad to introduce you.

### **Organization Events**

There are organizations for every possible service project, every profession, and every industry. You may already have discovered that, while it's great to mingle at organizations in your field, the chances of getting referrals there aren't very good. Instead, consider networking in organizations outside your industry. Since they are not doing what you do, they will more than likely need your services or know someone else who does.

Whatever your industry, other organizations that intersect with your industry are great sources of referrals. In the travel industry this includes associations of hotel

rate of success that was attributed to companies starting in such an environment. The level of response to my talks instigated a great number of these organizations to offer their professional expertise to the Clusters.

Then somewhere along the tenth or twelfth time I delivered my twenty-minute "Incubators Are Not for Chickens" presentation, I provoked thoughts of new businesses who by themselves might struggle to get by financially for years. Yet in the Cluster, they achieved a 90% success ratio within the first 2 years. This meant that they achieved \$2 million in sales and/or grew to the point of ten employees.

Early on in my speaking career I was speaking at a Rotary Club in Berkeley where we were fed pasta, meat with gravy, and some very rich dessert. At that time, I was not yet aware how quickly high carbohydrate meals turn to sugar. This will cause most people to experience sugar spikes and get incredibly tired. Regardless, I barely ate a bite because I was too nervous.

When it was time to get up and talk about how the Rotary group in Berkeley could support the new incubator in Oakland, I noticed that at the second table back, a man who was in his mid-60's sat with his arms crossed and his eyes closed. Shortly after I was introduced and began to enlighten my audience, this gentleman began to snore. Most of the other members laughed softly, while still paying attention to my talk the best they could.

Then the snoring became unbearably loud. It was impossible for the audience to concentrate on what I wanted them to hear. Some of them couldn't even hear me over the snoring.

Feeling distracted, I walked out into the group and

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group, one of my worst fears came true. The trouble began when, instead of introducing myself as “Sharyn Abbott from Uniglobe Travel,” I blurted out, and “I’m Sharyn Uniglobe from Abbott Travel.” Everyone laughed, and I was terribly embarrassed. Then I realized they weren’t laughing at me (though I wasn’t yet ready to appreciate that it really was funny), they were laughing because it was truly funny. Somehow I managed to get through the five-minute presentation and sit back down without further embarrassing myself.

It took about two years to decide that in order to build the kind of business success I wanted, I had to overcome the fear of speaking in front of other professionals. To do this, I knew I had to practice speaking in front of larger groups.

I heard that service organizations were always looking for someone to speak at their meetings, so I started asking everyone I knew who was a member of a Rotary Club, Kiwanis, Lions, or any of the women’s groups.

My first topic was “Incubators are not for Chickens.” I talked about the cluster environments that are dedicated to start-up businesses in a specific industry. In a business cluster, several businesses share office equipment and a receptionist. Consulting services and venture capital resources are made available to ensure their success.

It was a perfect topic for service groups, for they are always looking for ways to become more involved in the community. Cluster environments need support from the kind of people who belong to these service groups. When I began talking about Clusters, most of the organizations had never heard of the concept. They were amazed at the level of support that was provided and the national

and motel owners, meeting planners, airlines, food vendors, rental car dealers, and suppliers of maid service.

Associations are listed in the phone book as well as the Encyclopedia of Associations in the public library.

## Choosing Events

When you schedule time to go to events, you also need to allow time to follow up on your leads so you can turn those leads into business. If you don’t pace yourself, you’ll find that you will end up attending so many meetings that you burn out. That almost happened to me during those challenging days after the outbreak of the Gulf War in January of 1991.

To pay for my five employees and a monumental overhead, I joined 15 separate organizations for the additional exposure. I was in one meeting or another five days a week, 7am, noon and 7pm. It was the only thing that helped the agency survive. Yet, with that pace, I was totally exhausted every weekend.

I believe that business should be conducted during business hours. Not at 7 in the morning and not at 9 o’clock at night; but, when you’re beginning your business, it’s necessary to bite the bullet and get yourself out in the community as often as possible. I’ll give you some examples of the types of events you should attend.

If you are in computer repair, office furniture, benefits, moving, interior decorating, telecommunications, or anything related to a company that’s moving, expanding, downsizing, promoting or starting up, you have services that people in Human Resources need.

Wherever you do business, there is almost always a Human Resource function close by. Here in the Bay Area

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we have the Tri-Valley Human Resources, Northern California Human Resources and National Council of Human Resources Association.

About 80% of the attendees of these events are Human Resource directors for large companies. They go to the monthly functions to keep up to date with the requirements of their department and to gain insights on the ever-changing governmental regulations.

To benefit from attending Human Resource meetings, you must respect their purpose of continuing education. You will not be permitted to solicit business in any way, shape, or form at these functions. What you are allowed to do is gather names, join the organization, and begin a relationship with the members. Then, when a company is on the move for any reason, you will hear about it at the function.

If you are a consultant who earns your income from training or workshops at larger companies, you can benefit from several national associations.

The American Society for Training and Development, The International Management Consultants, any speaker's training organization like National Speakers Association, International Facilitators Group and the International Association of Business Communicators are only a few of the groups where you will discover what companies are looking for in additional specialty training. You'll also find out who actually selects the consultants for that training.

The International Facilities Management Association, IFMA, which plans the strategy for moving for large corporations, is a great information source for many industries. The Banker's Club, if you're an accountant or

*"Those who speak about their industry earn an average of 40% more than those who don't."*

-Internal Revenue Service

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## Speak Easy

The book of lists rates public speaking as what people fear the most. Death is listed as the fifth most feared.

I can easily believe that ranking. Although I now love public speaking and often get paid well to do it, I once struggled more with public speaking than nearly any other area of my business development. Realizing I had a lot of company in the fear I felt, didn't help at all. I couldn't imagine how I could possibly get up in front of a group of people, convince them that I had something valuable to say, and speak as though I enjoyed it.

The first time I got up to speak in front of a leads

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involved in financing, will be beneficial. The Cash Flow Association is for those who are involved in funding, factoring, and other alternative means for cash resources.

The Internet has an incredible resource for groups, associations and events. Refer to the Elite Leads website, <http://www.eliteleads.com>, click on the Resources page and then the organization's page for ideas on groups that might interest you.

A useful website, <http://www.bizjournals.com>, provides as helpful information about company news for 41 major cities. It offers no less than twenty to thirty events each week that bring together executives, CEO's, human resource executives and every possible business department. Every time I've been to one of these functions, I have met presidents, vice presidents, and corporate management officers of Fortune 500 companies. I always remember to call them within the week and offer a contact that they need or that might prove to be helpful.

The Internet has more sources than can be mentioned here. If you use Microsoft Explorer and type "Organizations" in the subject line of the search, you'll find more resources than you could possibly utilize.

Magazines and trade publications regarding customer relations, trade associations, and financial services are wonderful resources for industry-specific events.

Most local newspapers list events in the business section. Some events will allow you to meet face-to-face with companies that are difficult to penetrate. Career and tech fairs provide personal contacts within companies.

Trade shows are my favorite. Exhibitors are captive behind their tables. They have nothing to do except talk to those who walk by. However, never try to solicit business

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from exhibitors at trade shows or organizational functions. Respect the fact that they have paid to be there. The proper protocol is to introduce yourself and ask them who they are looking to meet. Then you might also ask who in their company would be appropriate for you to meet.

Follow up during the next week with that person and say “I met Mary at the Tech Fair last week and she told me that you are the one who . . .”

Jim Fagan, who has been in Elite Leads for about a year, tells everyone that trade shows are a great way to find qualified leads. His goal is to leave each show with no less than four great contacts.

I usually serve on one or two boards of directors at a time. When you target boards in your specific industry, they can be extremely beneficial, especially if you can convince the board to produce an event or a trade show.

The National Association of Society Executives is a group of presidents and other top executives of associations. They generally meet monthly and are the decision-makers about who is chosen to speak at their association functions and trade shows. Even better, association members are potential clients, and when you meet them in a neutral environment, their defenses are down. It will be much easier for you to build a rapport with them.

In Northern California, the Commonwealth Club is an affordable professional group that brings well-known speakers in a reduced rate for their membership's benefit. Their members are typically upwardly mobile individuals who strive for excellence in every aspect of their life. With a little research, you can find similar groups in your area, either through the internet or local newspaper.

Ethnic groups like the Asian Business Society, Fili-

enhance your business operations and discover possibilities you'd never considered.

The more often you participate in outside educational programs, the easier it will be for you to learn how to stay flexible in challenging situations. Also, you'll get powerful positive reinforcement just from associating with others who believe in constantly improving their ability to be successful. For that one reason alone, great training programs are well worth their cost.



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Many video rental stores and public libraries offer a variety of business programs. At the public libraries, video rentals are free!

### **Internet Resources**

The Internet is turning into a great source of continuing education. With the advent of search engines like dogpile.com, aj.com (Ask Jeeves), and about.com plus all the established search engines like Yahoo and Alta Vista, it's easier than ever to research subjects about which you need to learn. The web is also loaded with sites that offer articles on business topics. A few of these that my members recommend are fastcompany.com (the free, on-line version of Fast Company magazine), guru.com (though targeted to free-lancers of all fields, their marketing articles are useful for all small businesses) and myprimetime.com (look at the "Entrepreneur's Toolkit" section in particular). These articles can be easily printed for reading at your leisure or bookmarked for future reference.

When you're ready to expand your continuing education even further, there's nothing like the excitement of a live training session with a first-class presenter and the chance to discover how others connect with the same kinds of situations you experience daily. Some of the great national presenters and training companies that regularly pass through major metropolitan areas are Tom Hopkins, Brian Tracy, Anthony Parinello, Anthony Robbins, Peter Lowe, Peak Performance, and Skill Path.

When you attend national training events, your awareness of the world expands incredibly. Your frame of mind sharpens, and you become more creative. You'll get an opportunity to gain enlightening new perspectives to

pino/American or other cultural chambers are especially beneficial. I attend whether I'm within their ethnicity or not. These groups have limitless resources for you. More often than not, you'll find that they have a "let's take care of business" attitude. I appreciate their business ethics of getting to the point or moving on. They generally don't utilize stall tactics. It's quite a contrast to groups filled with people who tell you what they think you want to hear. I don't know how this got started, but what a waste of time and words! Tell it like it is!

Too often, when someone says, "call me next week," you're never going to be sure if they actually intend to do business with you. Are they putting you off, perhaps assuming you'll be like most everyone else and you won't remember to call? It is a shame that they have so little respect for you and for their own time. The ethnic groups are more direct and truthful about what they are interested in.

### **Organization Protocol**

Call ahead and discover what the organization's rules are for visitors. Attend a couple of meetings, respect their visitor rules, but get to know how they operate. Are they open to you as a member, or is their primary purpose to collect your membership fee? Do they run by strict guidelines or are they predominantly a social structure?

Make sure you bring business cards and literature. Choose to sit at a table that contains predominantly members of the organization, not other vendors like you.

Be aware of your environment. There is no right or wrong, just what will work best for you. Always be conscious that attending any function is not the time to

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sell, but to become well acquainted with the members. Once you've attended each function you'll have a better idea of where your time is best spent. Don't expect that you'll get business right from the beginning.

The protocol for any function is straight across the board, fairly typical. It won't matter if you're attending a chamber mixer, trade association, or any of the other groups. The main objective is to show up, then after deciding your purpose and your target audience, adopt a positive attitude. If you're extremely nervous about attending, ask someone whom you know well to go with you. I strongly suggest that you offer to pick that person up so you can arrive at the same time. Practice how you will introduce each other, rather than yourselves. This will take the pressure off of both of you and will typically allow you to meet more qualified contacts.

Third party endorsements are one of the most effective means of getting someone's attention and making a great first impression. For instance, "I'd like to introduce Mary Smith. She owns a travel agency in town and she does all my travel. Since I've been using her agency, she delivers all my tickets to my office and she always manages to include an upgrade on my car rental."

If Mary were to say this, it would seem inappropriate and as if she were bragging. She would probably be very uncomfortable touting her benefits as well.

Once you both have developed a comfort level in introducing each other, you will find that you'll begin to look forward to attending events with each other. It will be more productive as well.

When you find an event that's right for you, go and make the best of it. I had been telling Brad Warren, a

Your limited reading time can actually be turned into an advantage. Reading or hearing about a new concept or a technique that has helped someone else be successful is just the first step in helping ourselves to utilize new knowledge. Often it takes two or three times of hearing or reading a concept before we can take action on it or implement it within our daily routine.

If you think about the few pages you read each day while you go about your business, you could digest a concept much better than if you'd read more pages but didn't apply the concept at all.

I developed a lending library for the Elite members and began to tell them to, "use your drive time for prime time." By listening to a business-related audio programs while they were driving to their appointments they were constantly being exposed to innovative concepts they apply to their business.

Currently we have 350 books, cassettes and videos. I encourage members to check out material every month. One member checked out a new program every month. Within two years she was selling 60% of her entire company's sales volume, even though there were three others in sales. We believe it was because she was constantly exposing herself to a multitude of educational concepts.

According to Brian Tracy, if you were to spend an hour a day, 5 hours a week, listening to an audio program, it would be the equivalent in time of attending college full time, because of condensed formatting. Imagine how much you could learn within a year of adhering to this pattern.

Videos are another great educational resources. Public and cable television stations offer business programs that you can be taped for viewing at your convenience.

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the phone book and newspaper.

Today, the number of nearby businesses who offer the same goods and services that you do has increased drastically. The competition becomes more intense by the day.

Anything and everything that you can do can help you to stand out in the vast array of competition is no longer an option.

It is important to know what all of your competition offers, as well as how you sell your services as being unique. One industry that has grown tremendously over the past 20 years as a result is the direct mail marketing services. I'm sure you receive three or four coupon books in the mail every month. I honestly don't remember seeing them before the early 80's. Businesses who use these services are generally the ones that survive during lean times, but they're typically retail services.

This is absolute proof that reaching your target audience is based on your knowledge of who your audience is and how to best keep your business name in front of them at all times.

One of the easiest, best and least expensive ways to expand your knowledge is reading. Every year at least a hundred books are published for improving business skills. There are books on motivation, organization and everything else it will take to make sure your business is going to stay competitive.

If you think you don't have time to read, you can find a few moments each day to skim at least a few pages of a book or business related article. You can then consider what you've read and how it applies to your business as you go about your day. It's simply a matter of adapting to the discipline.

long-term Elite Leads member, about the American Society of Training and Development for more than three years before he finally decided to finally attend a function. At his first meeting, he received four leads from his table of nine.

How many times do you have to get that many leads before you have more business than you can handle?

You won't have enough time to attend every event you discover. So make your time count. Choose your events wisely. I challenge Elite Leads members to attend at least one function each month that they have never attended. That way they'll constantly be exposed to new business circles.

Finally, remember that old adage: "birds of a feather flock together." Speaking from experience, at least where money's concerned, that's true. I believe that if you hang out with people who have money, it's a lot more fun and profitable than hanging out with people who are always coming up short!

*"I never let schooling interfere with my education."*  
-Mark Twain

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### **Continuing Education**

During the past few years I have been fortunate to experience business education programs in a variety of formats. I walk away with at least one tidbit of information that might help me refocus my marketing plan or provide encouragement in trying something innovative when, frankly, at times I get too busy to think about anything new.

I believe that Elite Leads has grown so rapidly because I am always being exposed to national programs that are developed with the entrepreneur in mind.

In the 80's you could become successful in business by simply hanging out a shingle and by putting an ad in

*“Great spirits have always encountered violent opposition from mediocre minds.”*  
-Albert Einstein

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### **Preparing for the Event**

Networking magic depends on the fact that people do business with people they know, like and trust. Unfortunately, most people don't give you much time to impress them with who you are and why they should want to develop a working relationship with you. Worse yet, if you make a bad initial impression, image consultants tell me, it can take 17 times to turn a poor impression into a positive one. How many times would you allow someone to try and change your first impressions?

That's why it's so important to polish your professional presentation until it becomes second nature. This

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doesn't mean being phony, for there's no better impression than a sincere one. But it does take work; similar to the work you may do to create a great party.

Long before you throw a party, you spend many hours planning and then executing your plans. You take care of other business so you're free to focus on being with guests once your party starts.

Attending a mixer requires much the same preparation. An hour or so before the event you prepare yourself. You might check your hair, reapply your makeup, straighten your tie and check your overall appearance.

Your preparation helps you feel at ease. Your ease helps others feel more comfortable. The caring you've put into preparation and planning communicates an air of confidence that will help others feel good about themselves. When you walk into the room you have your best smile ready. For the next several hours you meet, greet, introduce and are perhaps introduced to fascinating people. In this atmosphere, new relationships are easily created and established friendships grow stronger.

Your first impression — alert, friendly, poised, etc. — is so positive that people feel comfortable being with you. Because you've practiced saying the benefits of your business in a few words, you can introduce your business in a way that will make people want to hear more. They'll even question you.

When you don't prepare well for an event, you leave everything to chance. Thus, you're more likely to end up exhausted or feeling confused. You might find yourself mumbling vaguely about what you do. Even if you can speak eloquently about your business, your intended message gets lost in your poor personal presentation.

Select the ten most ideal prospects and call them during the next two days. Set up meetings at their offices. Make sure you enter the names in your database. If you have to put the time on your calendar just to make sure it gets done, then at least you won't waste the effort you've put into being at the show.

Before a week has gone by, make note of anything that you want to change before the next show and begin to implement the change. If your banner was too small, order a new one now. If your flyer didn't instigate a response, hire a graphic designer to come up with a call to action flyer that you can use for the next show.

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sell while during the show unless you know it's expected. The purpose of most shows are to gather prospect names only. If someone seems to be a good prospect, write the information on the back of his or her business card.

If you get tired of answering the same question over and over again, take a break. Walk away for a few minutes. Try walking outside and get some fresh air. Do whatever you need to do to stay alert and attentive throughout the show. Many times, the last person I talked with turned out to be the best contact of the event.

Even if attendees dwindle to a trickle before closing time, never tear down your booth before the show is actually over. This is forbidden, and most event planners will never allow you to return if you do so. And you never know who might show up at the last minute.

### **After the Show**

Sort business cards according to the possibility of whether you think they will do business with you. The best ones will be your hot prospects. Create a list of potential Power Partners who you'll want to get to know, and those who you believe will never have a reason to do business with you or even refer someone to you. They might be retirees, students or business people who you don't believe ever have any contact with your typical prospects or Power Partners.

Send a note, postcard or letter to anyone you think is a good prospect and even those that you're not sure if would ever do business with you. Maybe they have a client that is looking for your service. If you don't think you'll have the time or always procrastinate on this kind of task, hire someone to do it.

### **First Impressions**

People develop their first impression of you in many ways, but there is nothing as permanent as the physical impression you create. This is checklist will help you eliminate typical oversights:

- Walk into a room with confidence
- Wear professional attire
- Wear colors which blend with your own coloring
- Check your hair
- Check your makeup
- Practice your handshake
- Wear your professionally made name badge on your right shoulder
- Have plenty of business cards
- Have a positive attitude
- Be sincere
- Practice your introduction
- Remind yourself to listen intently to others

Every item on this list can be improved or updated with your attention. Some details, like designing your business cards or creating a good self-introduction, should be prepared well before the event. Some will be done the week or day before, like making sure your professional attire is ready to go. And some of it will be done just prior to the event itself, like sprucing up your appearance and attitude.

### **Introducing Yourself**

Have you ever been introduced to someone but hadn't the foggiest idea afterward about what that person does? Have you ever been disappointed because someone failed to live up to his or her introduction? Or have you

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avoided a relationship with someone because their introduction led you to believe they didn't offer you anything of value?

If you want your introductions to work better than this for you, it's time to work on your introduction. Here are two of the many ways Dave Jones, CPA, could introduce himself. He could settle for the common introduction of name first, then title followed by a few words about what he does. "Hi, I'm Dave Jones. I'm a CPA and I help small businesses with their accounting tax services.

This introduction doesn't give you any hint as to why you might do business with Dave Jones rather than all the other CPAs you know. It also leaves you with the thought of taxes, which is not the most pleasant subject for most business people.

Suppose David introduced himself by telling you a feature and a benefit of his business. "I help clients keep the money they work so hard to earn. I'm David Jones, a CPA, and I specialize in small businesses."

"I help clients keep the money they work so hard to earn." Gets your attention, doesn't it! You would be more likely to want his business card. In just 12 words David has communicated that he understands you and that he can do something you may want and need. Doesn't it inspire you to remember his name?

"I specialize in small business needs." Chances are high that by the time you hear this, at least one of the following is true:

- 1) You need what David does and are ready to talk business with him,
- 2) You know someone else who can use David's services and you're delighted to introduce them to David,

This is where the questionnaire comes in handy. Sometimes it's easiest to ask questions that are prepared beforehand. People are more likely to respond if you suggest that by answering the questions, they will be entered into the drawing for your raffle prize. Most people enjoy the opportunity to win something nice.

## **Avoiding the Pitfalls**

No one likes to feel uncomfortable. When people feel uncomfortable, they tend to seek out their comfort zones, like only talking to people they already know. This is not the behavior you want to encourage from trade show attendees!

When a person who is sitting down talks with someone who is standing, the person standing often feels uncomfortable. It also will appear that the seated person doesn't think the other person is important enough to bother standing up.

You can help attendees feel more comfortable and important with two simple actions. First, have the chairs removed from your booth. Next, push the table to the back of the area.

This will also give you more room to bring people into your booth. If all these tactics work so well that you attract a large crowd, pick up the bowl for business cards and ask the people who can't get into your booth to deposit their cards.

Your beautiful booth can quickly become messy, because often people just leave their trash on your table rather than looking for a waste can. So keep an empty box under the table and toss your used paper, cups, etc. in there.

Always honor trade show protocol. Never try to



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### **It's Show Time**

Arrive early. Allow at least an hour to set up your booth and an extra half-hour for unexpected traffic. The one thing you want to avoid is showing up overly stressed.

Take a few minutes to walk around the trade show floor. Make mental notes about what you like or don't like at other booths. Do an image check. Is your hair neat, tie straight, dress and skirt seams aligned, shoes polished? Make sure if you're hungry that you grab a quick bite to eat. I do not believe it is appropriate to eat or drink anything while you're in your booth.

Almost everyone I know skips a meal now and then. When you're going to be at a tradeshow, standing on your feet for two to six hours is not the time to do so. If nothing else, for a quick energy boost, have a health bar that is loaded with protein handy.

Most people find it difficult to start conversations, so be sure you have your list of conversation starters related to your business. "What business are you in? ... How long have you been in business? ... Have you ever thought about [your] product/service? ... What product/service are you currently using?"

Never, ever bad-mouth your competition. I don't care if it's Attila the Hun! Keep focused on your business and speak only positively about others. If you know of a specific point where you outshine the competition, you can mention it without appearing to bash anyone.

For instance, all other leads groups meet in restaurants. I might say "Elite Leads meets in conference rooms and we don't serve food." Without saying anything about the other groups, I've made it clear one way we stand out in the crowd of lead organizations.

3) You want to talk more with David because you want to connect with people he knows and/or,

4) You want to talk more with David simply because he's interesting and he appears to be more creative than the average accountant.

Notice that it takes 30 seconds or less for David to complete this introduction. That's the maximum length of time you'll get at most Chamber of Commerce or other mixers to create a positive impression.

More personal introductions might work better for sit-down affairs or formal business gatherings. Simply introduce yourself with your name only. Then wait to see if you're asked what you do for business.

Whatever kind of introduction you choose, write it down. Say it aloud. Edit the words until they flow smoothly. Practice saying it until the words roll as easily off your tongue as your address or telephone number.

### **Your Business Cards**

Long after the event, your business card carries your impression out into the world. Business cards are so inexpensive these days that there's no excuse for not having a business card or for having a poorly designed one.

Aim for a business card that will remind people who you are and will have them thinking positively of you even if they promptly misplace the card and don't find it again until months later. If your business name (e.g., Wilson and Sons) doesn't make it obvious what you offer, then add a few words that do ("silk, cotton and other natural fabrics"). I prefer Wilson Fabrics, which doesn't require an explanation.

Make sure your name, company name, phone, fax,

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email address and other essential ways to reach you appear on the card. Even if you can't afford a graphics designer to create a great logo, use a computer to lay out the facts attractively. (Your local SBA, One Stop Capital Shop or library may have computers with business card layout templates that you can use without charge.) Never use less than 9-point type or light ink. Otherwise, everyone over the age of 30-something might have trouble reading it. Test possible layouts with your friends until you find one that inspires the reaction you are looking for. Do they ask questions? Do they look at it longer than two seconds?

Don't hand out cards that have been run off on a laser or inkjet printer at home, not even cards that you print on that expensive preprinted bordered business card stock. These cards scream, "I don't take myself or my business seriously. I don't believe in my ability to do business with you. I did this in a hurry, and there's no guarantee I'll still be here if you call me six months from now."

Instead, have your cards professionally printed. Many office supply stores will print basic cards for about \$20. Order at least 500 cards. That will last you about six months if you go to at least one event a week.

As soon as you can afford it, upgrade your card with better paper, colored stock if you like, and a professionally designed logo. Hewlett Packard, IBM, and most other major companies redesign their logo every ten to fifteen years. This calls attention to the company and keeps the name and image more readily in the minds of clients and colleagues.

Don't carry your cards in your wallet or pocket where they will get bent or dirty. Invest in a nice business card case to keep your cards crisp and new looking. When

ing an attractive booth. Give it your particular style to the design. Don't hesitate to create something different than anyone else.

### **Table Display**

Most events include a 6' or 8' table. Make sure before you go that you know exactly what you're getting. You'll want to decorate the table to make it attractive. I use two distinctively different materials from a fabric store. One is teal (to match my logo) satin and the other is covered with silver sequins. I use a white linen tablecloth that drapes to the floor in the front and on the sides of the table to hide boxes, purses and the carts for bringing materials into the show.

I place two small (4x6) boxes, one at each end, about 9 to 12 inches from the edge of the table. Then somewhat randomly, I distribute the teal material in a gathered "S" pattern over the boxes.

On top of that, I place the sequined material just enough opposite the teal material so that you can see both, most of the time.

On top of the boxes, I place the business card holder and my postcard display. In the center of the table are the bowls for collecting business cards and the bowl of candy. My newsletters are set off to either side, usually depending on which direction most of the traffic comes from.

Whatever design you use for your table, check to make sure everything you don't want seen is hidden under the table. If you leave boxes and stuff out in the open, it will be esthetically unappealing. People will generally interpret this to mean that your business conduct is not orderly, organized or focused.

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### **Dressing for the Event**

Professional attire is the obvious rule, but there are many interpretations as to what looks professional. Half the battle at the tradeshow environment is getting people to stop and talk to you, so take special care with your appearance. Because trade shows highlight what's new, improved, or not yet known to participants, it's extra important to ensure that your clothes aren't out of date.

I enjoy seeing men step out of the norm and don bright, colorful ties. Some men wear a boutonniere. It looks sharp and gains special attention.

You'll find that investing in a comfortable pair of shoes is mandatory. You'll be standing the entire length of the show. I hate to see exhibitors standing there with a pained look on their face because they believe their high heels are more attractive than more comfortable shoes.

### **Extra Color**

Most vendors enliven their booths with either balloons or fresh flowers. This attracts people to the booth and will often cause people to stop and comment. You can also opt for a live plant and use it for your raffle prize.

One of the most memorable booths I've ever seen was by a balloon company in Castro Valley that created a tropical island display completely out of balloons. The exhibitors were judged for the show, and of course they won! Another company's booth was made from PCV piping. Painted in bright colors and put together in unusual angles, it was very impressive.

Think about what it would take to make you curious enough to want to stop, if you were to look at a booth for the first time. Let your inspiration guide you to design

you pull your card out of its case, you portray an image of caring. I actually invested in a second business card case to make sure I never run out of cards. I bring both cases to events where more than 100 people may attend.

One last thing about your business card. It's very easy to rush off to an event, then realize you've left your business cards at home, where they won't do you a bit of good. So add this to your checklist: make sure I have at least 20-25 business cards with me at all times or always have an extra supply in my car and briefcase.

### **Your Name Badge**

Why settle for a sloppily written name tag when you can have an elegant permanent name badge for only \$8-15? You can get one at any trophy shop. They will scan your logo and make it match your business cards. I order mine with a magnet rather than a safety pin catch. It saves me from having to put holes in expensive business clothes.

I have one badge with just my name and another with my logo and full name. Name badges work best if you use at least 24 points for the type. Select a color for your name that matches your business card and have the background a solid color. A white background with black letters is the easiest to read from a distance.

### **Research Before Attending**

The more you know about an event and the organizers, the more effective it will be for you. Here are some questions to ask before you walk into a group's event for the first time.

- What is the purpose of the organization and this specific event?

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- What is the cost to attend as a guest?
- Is this function a special event or part of an ongoing meeting? If ongoing, how long has this kind of function been held?
- Who are the usual attendees?
- What is the parking situation?
- Are you serving food and beverages served?
- How much are the membership fees?

You'll find it is much easier to initiate conversation if you come prepared with interesting information to share. So keep up-to-date with current events. Read the headlines of the local newspaper, especially if you have access to business related publications. Here you'll find a wealth of lead sources and conversation starters in the news. If necessary, make notes about specific incidents you think might prove to be a good resource for conversation. For more details on this, see the chapter on Creating Leads.

Other event attendees will appreciate the information you can share with them. If you become known as a resource for information about other events, you'll end up having people call you to find out what events you plan on attending.

### **The Right Kind of Attention**

Casual attire may be the rule in dot.com start-ups, but for most business events it's important to dress professionally. At the very least, you need to be neat and clean. Make sure you are wrinkle-free, too.

Here are some hints that come from years of going to events and talking with image consultants.

- Make the best use of color research. When you wear colors that reflect your strengths, people

You never know when one of these items will save the day! One trade show where I exhibited was set about 50 yards off the street. The event planner had forgotten to have signs on the street, but I made some from white chipboard on which I wrote the words "Trade Show." I attached several balloons and tied the sign to a tree. Most people said that they never would have found us if it hadn't been for the balloons.

Even if I don't need any of the items from the toolbox, the show always goes better because I know I am prepared. In fact, most of the time someone else needs the items, which is an instant generator of good will. I've gotten to be known for how prepared I am. That's a great feeling to have!

### **Signage**

Have a sign professionally made by a sign maker unless you're proficient at word processing and layout. The sign can be as small as 8 1/2 x 11 so long as it can pleasantly accommodate pertinent information in lettering large enough to be read easily from 4 feet away. You might choose a bright color for more impact.

I've gone through many revolutions for my tradeshow booth. I started with an 8 1/2 x 11 stand-up flyer that listed the benefits of being in Elite Leads. Then I went to using an easel. I had my local sign maker create a 24 x 48-inch display of the benefits. Then about a year ago I found a resource for tabletop displays that are very reasonable. I had my logo, website homepage and benefits list laminated and placed on the panels. It's easy to carry and set up, and it looks much more professional. My next step is to purchase a pop-up booth with display lights.

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made based on fulfilling my business needs and should never be based on getting freebies.

### **The Tool Box**

I carry a loaded toolbox to every trade show and have been grateful many times just to have it. I include:

- Adhesive
- Balloons
- Brochure racks
- Camera
- Cash box
- Clear packing tape
- Cleaning rag
- Clip board
- Credit card forms
- Extension cord
- Hammer
- Handiwipes
- Needle and thread
- Paper clips
- Pens, pencils and felt tip markers
- Receipt book
- Rubber bands
- Safety pins
- Scissors and Exacto knife
- Scotch tape
- Shoe buffer
- Spring clips
- String
- Stapler
- Velcro
- White chipboard for last minute signs

will tend to pay more attention to you. Some strong colors, particularly red, may make you appear unapproachable (though the same color may be dynamite at a party). Light earthy colors can be interpreted as wanting to blend in. Your best colors will be pleasant to look at without being garish. The colors you wear should allow you to be seen first, before what you're wearing.

- Wear something that will let you stand out a little in a positive way. A blue pin-striped suit with power tie might look sharp, but dare to wear a shirt or tie that reveals your individual personality.
- Check your hair, front and back. If you're still wearing it the way you did when you graduated, you may be giving out a message that your ideas are outdated or that you're staid and inflexible.
- Ladies, please check your hems and include your image from the back to make sure your slip isn't showing. Your mascara should be on your lashes, not creating spider tracks under your eyes. Put your lipstick on straight. If there's an obvious line where your foundation stops, invest in a makeup sponge and smooth out the line.
- Gentlemen, make sure your tie doesn't reveal what you had for lunch and that it reaches your belt, not longer, not shorter. Check the back of your neck to ensure that your hair is neatly trimmed.

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- Review all of your other grooming details. Manicures may not be essential, but having clean, filed nails is. Clip hairs that protrude from your nose or ears.
- Are your shoes well kept or do they look like they need to be retired? Your clothing and shoes must be comfortable, rather than causing you to be distracted by the discomfort.
- Never, ever wear a distracting outfit. A woman at one function I attended a few years ago wore a black-and-white print dress with beautiful black patent leather pumps and matching purse. Her accessories included a gorgeous black onyx necklace and earring set with a wide-banded silver bracelet watch. She was very stylish except that the spiral bulls-eye pattern on the dress hurt my eyes if I looked at it more than a few seconds. Whatever her business was, I was so overwhelmed by her costume that I never stopped long enough to find out.

### **Walking in with Presence**

If you slip quietly into the room, no one may notice. If that's what you really want, why bother stirring from your comfortable home? At best, you'll fail to be remembered and, at worst, you'll create an impression of being ineffective. The opposite approach of entering a room boisterously and dramatically, can create a negative image.

To make your most effective appearance, remember why you're coming to the event. You want to meet new clients and Power Partners. If you're nervous or simply need a quiet place to pull yourself together, look for an

Before it goes to the printer, double check to ensure that you have your name, business name and at least the phone number included. Many people actually leave off critical details like this, which defeats the whole purpose for having the offer.

Make sure you have plenty of business cards. If you have brochures, be selective about who you hand them out to. Not everyone is a potential client and you don't want to waste your material.

You might want to develop a brief questionnaire. If you can create questions that inspire the attendees to think about why you would do business together, you'll get a better response. This gives you a great reason to talk to people who stop and wonder who you are and what you do. If you have a newsletter and want to hand it out, bring a clear display stand that will show it off.

### **Handouts**

Most exhibitors have something to hand out at a trade show other than candy. Advertising specialists will imprint your name on pens, computer screen squeegees, a letter opener or just about anything you can dream up. Unless you have the \$500 minimum budget for this, don't be overly concerned with trying to compete with the banks, realtors and those who have large corporate backing and unlimited resources.

I have never done business with someone because they gave me a coffee mug, nor have I ever walked away from a vendor because they didn't give me a trinket. I enjoy collecting the ad specialties for Chris and Melissa, my niece and nephew. Giveaways never influence my personal buying decisions. Nor should they. Those decisions are

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### **Prior to the Show**

As is true with all events, the impression you create at a trade show is vitally important to your success and your preparation will make all the difference as to whether or not you appear successful. Thus, before attending, ask questions. How many people are expected? When the trade show was held in the past, were there 100 or 1000 attendees? You don't want to run out of material, but on the other hand, you don't want 900 leftover flyers imprinted with a time sensitive offer.

Find a unique looking business card dispenser or holder for your booth. I use a brass one with beautiful filigree designs that stands vertically. You can find a large variety of impressive holders in specialty gift shops.

Also select a unique bowl to collect business cards. It should be about the size of a large candy dish. I use an unusual pewter bowl that I found at a craft fair. It looks great and always draws comments. It's a great conversation piece because it's so artistic.

Take a cue from successful exhibitors and increase the number of business cards you receive by offering a raffle prize. Key the prize to your business, e.g., a savings bond if you're in banking, a wine selection or overnight hotel package if your business is hospitality related, or a briefcase if you sell office supplies. Great raffle prizes for any business include gift certificates for Nordstroms or other quality store and club memberships.

Whatever prize you offer, the perceived value has to be obvious. An overnight stay in a nearby nondescript town would not encourage anyone to leave a business card.

You'll want to prepare a flyer with a special time-sensitive offer. This will inspire prospects to take action.

empty area outside of the event. Recall the purpose of the event and some of the information you researched about the organization. Relax and focus on your intention to make new contacts that could lead to new business, new opportunities to work with others, new friends and new insights.

Be yourself. A phony is easy to spot. If you find it difficult to relax, think of the last time you were with your family or friends. Remember how it felt to be surrounded by those who know you well, and accept you on either good or bad days. Each new person you meet will learn to appreciate you for who you are, when you approach them with an open regard to help them as well.

Everyone has something to offer. Be sincere and you'll find that most people are very generous.

Finally, it's time to just do it. Put one foot in front of the other and walk into the room as if you own it. You are prepared to experience other equally fascinating people.

### **Reaching out**

According to Emily Post, it is up to the woman to extend her hand first to shake a man's hand. Practice these techniques if you're not comfortable shaking hands. In a proper handshake, both thumbs should be on top with the web between each other's thumb and index fingers meeting. The shake should be held for about three seconds, while making eye contact. Any longer than that is reserved for better acquaintances and good friends.

Susan RoAne, author of *How to Work a Room*, warns against four types of handshakes:

- 1) The limp jellyfish shake, which is often done only with the fingers, portrays a person who lacks confidence or commitment.

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2) The knuckle breaker is a firm grasp that leaves impressions of your rings embedded in the other person's fingers. This type of handshake often comes from someone who is trying to overcompensate and appear more confident than he or she are.

3) The finger squeeze combines elements of the jellyfish and knuckle breaker and is just as inappropriate.

4) The covered handshake, in which one person holds both the other hands in their hands, can convey warmth and friendliness in social environments. In a business environment that handshake says instead, "I have you now and I'm in control until I decide to let you go."

When shaking hands, the most comfortable distance is to stand about two feet apart. Much closer and most will feel as though you're invading their space. Any further away and they may feel as if you're being distant.

Stand with your elbows slightly bent with your feet apart about the same width of your shoulders. A delightful exception is one that Ken Neiwald, one of my members, who stands 6'2" tall, practices. I saw him spread his feet about 24 inches apart as he met a guest who was about 5'4". This made it easier for her to shake hands with him. His consideration of their height difference made both of them more open to a longer conversation.

Keep your shoulders square with the person you are greeting. I've watched many men turn slightly toward 90 degrees. This is defensive and could be viewed as being protective when to getting to know someone.

I personally do not believe in the business kiss at a

*"The show must go on!"*

-Anonymous

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## Show Time

Trade shows are wonderful opportunities to show off your business and gain rapid visibility in your business community. Most chambers hold at least one trade show a year where you can exhibit for an investment of between \$50 and \$500. If yours doesn't, instigate one.

Before you exhibit at a trade show, you'll want to attend one to see what impresses or depresses you. Notice that most professional exhibitors hand out materials that are always sharp and professionally produced. Others, who offer photocopies or sloppily produced materials, appear as if they had no advance notice.



business function. Even if you know someone that well, others who may be watching may misconstrue the kiss. On the other hand, I feel that hugs with those you know well are acceptable. I enjoy seeing men hug. I believe it makes them look less defensive or protective.

### **Developing Your Attitude**

When I started attending mixers, I took everything very seriously. When I started to relax, I noticed that people were much more likely to approach me. After attending events for several years, I began to see how humor made a major difference. For one thing, I enjoyed myself more. Then, because I was having more fun, others around me started to have more fun — enough so that they commented on it nearly every time we met.

Another attitude that works well is curiosity. It's a lot easier to approach others if you allow yourself to become fascinated with questions like, "What do you do? How long have you been doing it? Why did you choose your business? Do you specialize in a specific area?"

Obviously, ask these questions one at a time, not all at once! Remember that your aim isn't to grill the other person but simply to initiate a conversation you both will enjoy.

Years ago when I first went into the sales profession, the only way I could force myself to walk into an office for an approach call was to believe, "The next person I meet could end up being my next best friend." When you approach someone with a friendly attitude, it's extremely difficult for anyone to respond indifferently. Besides, everyone who is attending the function is there with the same purpose: to meet new contacts. And maybe you

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will actually end up with a new best friend.

Some times you just can't summon up a good attitude. If you've just had the worst day of your week, you might consider going home instead of blowing that potential great first impression. Or take a half-hour break before attending the function to rejuvenate yourself. Have a snack and some quiet time.

As busy entrepreneurs, it's easy to forget how important breaks are. An Aikido technique that works well for me is to take three deep belly breaths very slowly. It clears the cobwebs and creates the same amount of energy as eating a full meal.

Consider what you can gain from being present at the function. Pay careful attention to negative self-talk such as "I don't have anything to say" or "No one will want to talk to me."

Mary Kay Ash of Mary Kay Cosmetics, has inspired thousands of women to believe in themselves, but never more succinctly than when she said, "If you think you can, you can. And if you think you can't, you're right."

Also remember that you're not alone in your discomfort with mingling with strangers. Though we all may have been born to schmooze, judging from the ease with which very small children make new friends, yet few of us survived junior high with our social confidence intact.

Don't let fear turn into a cop-out. Go past the fear toward the vision that you may not only enjoy meeting new friends and clients, but also that they will enjoy meeting you! Adopt an attitude of, "I never know what the evening will deliver, but it's bound to be rewarding."

Helping someone else get more comfortable will help you take the focus off yourself.

in your home office at 2 o'clock, it doesn't mean that you're available for friends to stop by for coffee.

## Long Term

Long-term goals are beneficial for looking at where you would like your business to be a year from now. Would you like to have an assistant? Would you like to move into an office away from your home? Can you imagine yourself with an associate like many CPA's and attorneys have?

Once you've set your long-term goals, every week establish the course of action you will take to ensure that in a year you have accomplished what you need to do to ensure your success. What are the benefits to you? When will you accomplish this goal? What is the main obstacle? Who can help you reach the goal? What skills or education are required? What is your plan of action?

Finally, be flexible. One of the people I've always admired is Lee Iococa. When he took the reins of Chrysler Corporation, it was doomed to fail. Yet, he turned it into a very successful venture. One of Mr. Iococa's habits was to spend every Monday morning planning what would take place three years from that very date. He changed his goals often, but amazingly, when each 3-year date arrived, he was better equipped to meet his new goals due to his prior planning.

Learn from people around you and from those who have made a successful career for themselves. It is not necessary to reinvent the wheel.

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or education are required? What is your plan of action? What steps are you willing to take to ensure your success?

### **Sticking to Your Goals**

The main reason most people don't establish or accomplish the goals is due to fear. Zig Ziglar says "false evidence appearing real" is the true definition of fear.

There are probably more than a hundred quotes relating to fear, but what I would like you to accept is that the only thing you should fear is your inability to take action. Once you are in a forward momentum stage, you can change your direction as many times as you choose. But don't let the fear cripple you into doing nothing.

Don't try to do it all on your own! Ask everyone you know for help, whether it's for a business contact or a Power Partner. There are times that we're too close to see the big picture. By talking about our needs and brainstorming with others, sometimes we find that the most obvious solutions are right in front of us, but we're too close to see it. That's why a mentor or a master mind groups can be helpful. In a master mind group when you commit to a goal, you have others who help support your desire to achieve the goal each step of the way.

Ask each new client and prospect for a referral and a testimonial. Ask questions and seriously listen to the answers. Take time each day to work on your goals. Never let a single week go by unless you have challenged yourself to make progress on fulfilling your grandest wishes.

Don't let others talk you out of your goals, and don't let them distract you from taking your next step. Learn how to set boundaries. Tell your friends and family your working hours and stick to them. Just because you're

If you're still uncomfortable, volunteer to help. Or act like a host/hostess and search out other people who look like they're not comfortable, either.

As you reach out genuinely, your fear will melt away. You might even find that the other person is just like you: fascinating, shy, and grateful when someone cares enough to take the time to meet them.

Add each experience to your Victory Log for future reference. Someday, it'll make a great story.

### **Goal Setting**

Zig Ziglar who is known for inspiring motivation, says that goals require seven steps:

- Identify the goals;
- Specify a deadline;
- List the obstacles;
- Identify the people or groups that will help you accomplish the goals;
- Establish the skills and knowledge it will take;
- Have a plan of action and
- List the benefits you will realize when you've accomplished your goals.

Get started by making a list of what you want to accomplish, no matter how outlandish or silly the goals might seem. Next to the goal, list the reasons you want to accomplish it.

This will identify your driving force. Make a second list of all the obstacles you will probably face in trying to accomplish your goals. Be elaborate in trying to uncover all the reasons why you will be tempted to fall short of your goals.

Your next list will include every resource you can think of to help you reach your goals, such as classes, contacts, research material, businesses or anything else that you can imagine.

Short-term goals are daily and weekly goals. How many approach, interview, presentation and close calls or speaking engagements will you need to accomplish in a particular period of time to meet your larger goals?

What are the benefits of reaching your short-term goals? When will you accomplish them? What is the main obstacle? Who can help you reach the goals? What skills

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The original 3% who had committed their goals to paper had a combined wealth that exceeded the balance of the 97% of the other students.

What I found particularly impressive about this study that is very rarely discussed is that the same 3% had 80% who were still married to their first spouse and considered their married life happy and fulfilled.

Even if you've heard stories like this before, it is difficult to relate to the importance of goals. When I worked for a Fortune 500 company, I had to make five calls every day. I didn't see this requirement as a short-term goal that could help me reach a bigger goal. I misinterpreted the idea of making goals as being the measure of what I didn't end up accomplishing.

No one said anything, no one tried to convince me, but somehow my perception turned around when I owned the travel agency. I began to realize that goals are the stepping stones to controlling success. Without small steps, the goals can seem too overwhelming.

I mentioned previously how you can determine your income by the amount of initial calls you make, once you know your ratio of calls to clients. My monthly goals include signing up 25 new Elite Leads members and booking four speaking engagements.

To meet these goals, I have to make 200 approach calls to interest an average of 100 people. Of these, 50 can be expected to show up at a meeting, and 25 will join. My speaking goals can usually be met with six or seven calls to organizations.

If I fall short on my goals, I know that it will affect my income. Establishing goals helps me remember what I want to accomplish and measures my progress every day.

*“Imagination grows by exercise,  
and contrary to common belief, is more  
powerful in the mature than in the young.”*

-W. Somerset Maugham

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## Power Partners

Power Partners are a potent way to dramatically impact the quantity and quality of your leads. The power of having a relationship with other professionals is the difference between getting by and being a successful business venture.

Power Partnering is as pertinent to the growth of your business as the right plant food is to a tomato plant. With enough water (hard work and knowhow), your plant (company) will thrive rather than survive. If you feed your tomato plant regularly, you will get many more, much larger and far tastier tomatoes. Use Power Partners to grow your

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business, and you will reach more potential clients easier and faster.

Within three months after I introduced the Power Partners concept to Elite Leads members in 1994, the number of leads that members shared with each other more than doubled at each meeting.

Increased profits are only a small portion of the benefits. You become more creative, resourceful and you will have more fun. You will gain the satisfaction of serving your new clients and helping others learn about the resourceful services of your Power Partners.

### **Sharing Clients**

The Power Partner concept is simple. You collaborate with others who share your type of client, but for a different reason. The benefits include:

- 1) Significantly reducing the amount of time and money you spend on marketing
- 2) Each of you will gain personal referrals that are more likely to do business with you.

Suppose you're an accountant and you partner with a SBA loan consultant. Although each of you targets many of the same clients, you're not competitors. Often, people who need one of you will also need the other. Thus, you have nothing to lose and everything to gain from sharing leads and referrals, including people who are now your individual clients.

Each of you understands the others' business well enough to know what type of leads are useful, but because you move in different circles, you each come in contact with people the other wouldn't necessarily meet. When you pass referrals to each other, you also endow each other

*"This one step — choosing a goal and sticking to it — changes everything."*

-Scott Reed

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## **The Goals to Go**

Long and short-term goals are critical to business success. Goals focus and guide you. They give you stepping-stones to success. Likewise, when you fail to plan, you plan to fail. Plan your course of action, then replan regularly.

In 1953 Yale University surveyed its graduating class and found that only 3% had written out their life and career goals. Another 10% of the class had goals in mind that weren't committed to paper. The balance of the class, 87%, had not taken a single step to establish what they intended to do after their graduation. They had no plan.

Twenty years later the same class was interviewed.

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with a credibility you couldn't obtain working alone.

You can add several Power Partners individually or together. Perhaps you partner with a tax specialist or auditor, both of who have leads for your client base (and vice versa) without being in competition with you.

Pretty soon it becomes easy to think in Power Partner connections. As you expand your potential lead resources, you discover more noncompetitors in financial fields: bookkeepers, payroll services, bankers, financial planners, stock brokers, venture capital, and mortgage brokers.

Some of the most powerful partners most business people aren't aware of are those who factor receivables. Sometimes a company has an immediate need for cash and can't get it through their usual banking sources. For example, they need to expand but have been in business less than two years, so they don't qualify for a business loan. Or perhaps for some uncontrollable reason they're cash poor just when payroll and taxes must be paid. If they work with resources that factor receivables, they can obtain up to 75% of the total value of their receivables within 24 hours.

When you get to know those who factor receivables, you'll discover they know several businesses with a great need at all times for a host of other business services: qualified CPAs, business bankers to guide better business banking decisions, marketing consultants, business planners and management consultants.

Many useful concepts are developed out of necessity. The Power Partners concept was developed because I was concerned that about half of the members produced the majority of the leads that were offered in any meeting. These members always seemed to notice things like a new

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business moving into a building they passed, or they'd heard about companies that were hiring or cutting back. I could almost see their mental wheels whirling as they pondered, "Now who do I know that can use this information?"

Other members gave few or no leads. After a while, the members who shared the abundance of leads lost their enthusiasm because they weren't receiving nearly as much useful information as they were giving. As a result, I lost some of our most productive members.

By talking to less productive members privately, it was obvious that they weren't greedy or selfish people who wanted to get more than they gave, they just didn't know how to think in terms of leads. For many, the problem began with not knowing their own best lead resources.

Pat Sullivan of Visionary Resources believes that the challenge has more depth. "People just don't know how to do basic research or think like an investigator."

Deborah Bass has an unusual business. She disburses the funding for construction projects. The company she works for has been in business a very long time in the industry, and is well respected. Yet, Deborah struggled to get new clients who could do business with her.

After a couple of months in Elite Leads, I began to introduce her to bankers whom I knew personally. I thought that if she could work with the loan officers, they could go about gaining new business rather than managing the funds on existing projects. It was sure to develop into win-win relationships.

A few meetings later, one of the bankers offered to take Deborah to the Builder's International meeting. She met several developers during the evening, and she is now managing their construction funds.

## Service Organizations

An unending list of service organizations will help you make worthwhile contacts in the community. Being active with these organizations will give you a level of visibility that would otherwise be impossible to achieve.

One is Junior Achievement. They work with young adults, creating mentor programs, job shadowing and business awareness for high school students.

Some of the other groups are the Rotary Clubs, Kiwanis, Lions, Elks, Moose Lodge, Boy Scouts, Girl Scouts, Ham Radio Clubs, groups that are specifically for women in business and others for business owners in specific industries. The high tech industry functions are particularly ideal because you will find that many of the participants are new businesses who haven't selected their vendors yet.

Research the various groups in your area and attend news ones until you find the ones that supply you the most leads for new business or Power Partners.



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ment processes. They have a task force that explores the country looking for businesses that would benefit from expanding into our community. Every time I attend these functions there are eight people who share my table that are decision makers like CEO's and Vice Presidents. This is a priceless opportunity to meet in person with people who can make a decision to do business with you.

Sitting at the same table with these people over lunch is much akin to having a personal introduction into their company. When you get an opportunity like this always be conscious of the group's protocol. Certainly you may pass your business cards around and ask for the option to call at a later time.

### **Chamber of Commerce**

Join your Chamber of Commerce. It's the one place where you can be sure you'll meet the most active people in your community. Most chambers have leads groups. Be sure to join them.

When you become a chamber ambassador or a member of the welcoming committee, you'll gain high visibility. Try to be the first one at the door to welcome new members to the chamber. At every function, you will wear a ribbon or button that distinguishes you as an ambassador. You'll greet guests and be able to introduce them to other members.

Chambers are not famous for generating business for their members, but when you use the system well, you'll develop enough business to make it worth your while. Chambers provide a great sense of belonging. I'm still friends with several of the people I met ten years ago at chamber functions.

Then a mortgage broker asked Deborah to attend their mortgage industry function. They were so receptive and supportive that she ended up sponsoring a program for the group. Deborah was able to present her company to all of the attendees which gave her even more visibility and credibility.

Nearly all of Deborah's new business has come from thinking like a researcher. She has cleverly thought about all the industry-related individuals who are already working with her prospects and are capable of referring to her new business consistently. Now she can spend the bulk of her marketing efforts building long-term relationships.

When you create a Power Partnership, you create excitement and creativity in a much bigger playing field than is typically utilized in entrepreneurial circles. Everyone involved realizes that it's at least as fun and rewarding to give as it is to receive. The more we give, the more we get back, provided the giving is done freely without expecting something in return. The universal law is "what goes around comes around."

When I first worked on the challenge of how to help members give more leads, I knew I didn't have the time to teach everyone how to become a researcher or how to brainstorm. Therefore it is the basic premise of my business to educate and connect people who enjoy helping each other to become more resourceful and connect the more proficient with those who need assistance.

After much thought and experimentation, I came up with a list of industries. For each industry, there are several categories of individuals with whom they might interact. This becomes the basis for the Power Partners list, which is shown in The List chapter of this book.

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### **The Definitive Use**

Everyone has at least one or two Power Partners. Sometimes it takes a little imagination to discover who they are.

There are more than 200 specific categories that work well in the business-to-business lead environment. One of the biggest groups of Power Partners incorporates anyone who offers goods and services to help a company move or expand seamlessly, creating the least possible interruption to their everyday operations.

Industries that would be involved when a company is purchased might start with the business broker selling the business and the banker arranging the funding. Then the business attorney, commercial leasing agent, property manager, interior decorator, commercial mover, facility coordinator, and a turnaround specialist.

Some of the industries that would also help a company expand, involve sales and installation of equipment such as the telecommunications, office copiers and faxes, computer systems, furniture and security systems.

Property and casualty insurance agents, janitorial service, graphic designer, printers, sign makers and internet service providers are all be involved during the initial stages of a company start-up.

After the company is settled into their new space, they will want to have an open house or announce their new headquarters. They will need the services of events planners, caterers, and public relations specialists.

When a company is expanding they require printers, office and telecommunications equipment, furniture, training specialists and personnel agencies that will easily find them qualified candidates for their new positions.

the same level of respect as any other professional who has to touch their clients physically.

Chiropractors, doctors, cosmetologists or anyone else who touch their patients/clients are not required to prove they're in good health as a prerequisite to receiving a business license. Being singled out for a health certification is demeaning to massage therapists. Before this practice changes, the massage therapist will have to make the effort to change the practice of the licensing.

If the massage therapists had become more involved in the business community, I don't believe that this would still be a requirement.

### **Board of Directors**

Everyone has special interests. Here in the Bay Area, you can find a group for any cause. When you support something that you believe in with your valuable time, it's more than gratifying.

There are children's programs, senior projects, educational programs and even groups that do nothing more than sing or bring pets into senior centers.

Find something that appeals to you and you'll find a whole new group of people that are potential clients.

### **Keep Your Ear to the Ground**

You'll never find out that much about companies that are moving, expanding or individuals who are being promoted in your local newspaper. Whereas, community organizations offer a great way to uncover such information as well what new businesses moving into local areas.

I participate with a community council whose purpose is to investigate and implement economic develop-

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to have a fair say in the governmental structure and actions that affect you. Most city council members are elected. Find out what they stand for. What is their experience? Do they currently have a business? Are they of the “no growth” policy or will they advocate keeping up with the economic revolution? How available and responsive are they to key concerns of the business community? Do they take an active interest in small businesses?

Please take the time to research what’s happening in your community. You’ll stay better informed on decisions that relate to you. One downtown merchants association had assessed each business the equivalent of their business license fees just for the privilege of doing business in the downtown section. Then, they used that money to do something which actually hurt those businesses.

As far as anyone could discover, the merchants assessment fees were spent on two separate art festivals held on three-day weekends. During these festivals, the streets were blocked off and merchants’ clients were unable to park conveniently nearby. Until enough of the merchants attended the city council meetings and voiced their displeasure, the artists placed the back of their booths toward the storefronts. This totally blocked the view of the merchants from attendees. After much deliberation, the artist booths were placed back-to-back in the street, allowing ample visibility to the merchants.

In a neighboring community, the city business office requires all massage therapists to have a physical exam each year to prove they are healthy enough to conduct their businesses. This ludicrous licensing requirement will not change until enough of the massage therapists stand up to the city council. They must insist on being treated with

The possibilities are great, but rather than overwhelm you with an ever-expanding list of potential Power Partners. Let’s review the basic principles:

- Every business that assists your client base without competing with you is a potential Power Partner.
- Whatever your business, you share the same clients with many other businesses.
- To stimulate your thinking about how many Power Partners might be useful to you, review the Power Partners list.
- Use the Power Partners list not to limit your own list of potential Power Partners but to stimulate it.
- Tell your friends and members of your lead group who your Power Partners are. Ask for introductions to these specific industries from these groups.

## **Increasing the Stakes**

Basic Power Partners will generate a great amount of referrals. Working with these individuals is powerful when you are request specific client profiles rather than being vague. The more Power Partners you know, the easier it is for others to help you.

Put yourself in the position of someone from whom you want leads. It is frustrating to be with someone you’re willing to help when you feel you have nothing to offer. Does that feeling of frustration soon turn to a feeling that you’re being pressured? Do you ever feel resentful?

Now imagine they tell you who their Power Partners are and ask if you know anyone who’s in these catego-

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ries. If you're like most business people I know, your frustration of "whom can I possibly refer to this person?" will quickly turn into the satisfaction of "I know someone in the category you requested and I'll be glad to share those names with you!"

After you successfully utilize the Power Partner concept, you will want to develop a more dedicated relationship known as a Preferred Power Partner. It became an additional feature at Elite Leads feature in 1999.

Simply select one or two people who meet your basic Power Partner criteria. Ask if they're willing to meet with you regularly. Until you're both satisfied with the relationship, meet two or three times to get to develop a strong rapport. Then decide how often you'd like to exchange leads and information. Make a firm commitment to respond with them once a week or as pertinent information arises.

When possible, power up your referrals from "Joe, I think you should call Mary in Human Resources at this firm I've been talking with" to something more personal. Take the extra step of telling Mary about Joe and suggesting a Nutopian meeting which is where you'll actually introduce Mary and Joe in person.

Soon you will realize that your business is solid and you no longer have to struggle to find new clients.

Imagine yourself one year from now when everyone is calling you. They're giving you information about new companies or about events where you know you can meet some great potential clients.

Everywhere you go, you run into a Power Partner. Your business is doing better than you ever imagined. You manage to take time off every month to spend with your

*"Without a sense of caring,  
there can be no sense of community."*

-Anthony J. D'Angelo

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## **It's Your Community**

A multitude of surprising benefits awaits when you become involved in your community. Civic pride is one of the greatest and most honorable, but there are more.

Every day, decisions are made about how you can or cannot conduct your business, even in your own home. Attorneys or retirees who have time to devote to their community make most decisions. Do they have the same driving issues that you do? Absolutely not!

If you and every other entrepreneur were involved in your chamber of commerce, city council events and county business development forums, you would be able

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family. You've taken up a new hobby. You even have time to read all those trade publications that you used to stack up in the corner. Everything you do turns out well. You're always in a good mood and even lousy traffic can't diminish your positive attitude.

When you stop and think about it, you can't remember the last time you had a bad day. You even have a great savings account going and a sizeable portfolio to cover your retirement and the kids education.

And one day you catch yourself thinking back. It all started with that one Power Partner.

### **Challenge Log**

I track my challenges just as diligently. I learn more from the challenges than nearly anything else. They are my learning lessons. When I handle them well and consciously, I rarely see the lesson reappear a second time.

It took me far too many years to recognize that my biggest challenges actually turn into my greatest triumphs. That is, as long as I stay aware of the process and don't get caught up in challenge. Every process is different, but I believe it's the resistance that makes it harder to bear.

However, if I don't pay attention, the lesson will be repeated on a grander scale time and time again, until I finally get it right.

Several years ago a consultant who lived in Marin promised several times she would attend an Elite Leads meeting. Each time she missed the meeting I would call her and she would explain that a client had called at the last minute, she had a proposal to write or something else would always come up at the last minute.

Then one day after she had missed the meeting she called me. Needless to say, I was surprised. She told me that she was on her way to the meeting when she was rear-ended on the Golden Gate Bridge. My first reaction was, "yea, right!" thinking it was just one more excuse.

She laughed and said, "If that isn't a universal message to shove me towards the meeting, I don't know what would be!"

I have to say I was duly impressed. Rather than getting upset about the accident, she looked for the bigger picture. And, yes, she joined Elite Leads.

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at one time or another) opt to do something that will make you appreciate your life-style. Take a day off during the middle of the week.

My good friend Warren and I enjoy going to a movie in the middle of the afternoon when there are no lines and no kids. Another friend and I take off on a Wednesday or Thursday and drive down the coast where it's warmer. We look for a quaint place to have lunch and then take a long walk on the beach.

It is incredibly invigorating as well as a rejuvenating process. We return to our businesses refreshed and more energetic. And just as important, we've given ourselves permission to take a well-deserved break. When is the last time you took an unwarranted break.

## Victory Log

Keep track of your successes. It is extremely valuable. If I were to ask you who your best client is, would you be able to tell me how you met?

Keeping this information available works well to boost your spirit for those times when the business becomes overwhelming. And, believe me, no matter how long you've been in business, you will have those times.

I track all my successes, speaking engagements, published articles and acknowledgments.

My favorite is the album where I have all the handwritten thank you notes. Most of them are from members of Elite Leads and others are from people I've met in passing at an event. Because they took the time to let me know they appreciate how I helped them, I have found that it has added to my conviction throughout the years. It has been a confirmation that what I do has value.

*"Eighty percent of success is showing up."*

-Woody Allen

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## Attending with a Purpose

Before leaving for the event, refer to the Lists section on attending events to verify you have everything you need. No matter how many times I attend the same event, I refer to the list. It's so much more comforting to know I haven't forgotten anything.

Mentally review your goals. Why are you going to the event? How many people do you want to meet? What specific industries or companies do you want to meet?

Check your attitude. If you're not as positive and as energetic as you should be, use the Aikido technique mentioned before (page 30).

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When you check in to the event, put your name badge on your right shoulder. Then it will be in the direct line of view when you are shaking hands. This keeps others from having to be obvious about not remembering your name by looking to your left shoulder.

Take a deep breath and walk into the room as though you own it. I found that if I adopt the attitude that it's my private party (but I don't have to do the cleanup!), I am much more comfortable walking up to people I don't know. After all, if it truly were my party, I wouldn't hesitate to make sure I welcomed everyone there and go out of my way to make sure they're comfortable.

Notice the surroundings. Is there anything unusual about the room? Are the colors particularly appealing? How is it furnished? Do they have a unique view? You can use this later in your conversations.

If you're hungry or thirsty, make that your first priority so you can give your undivided attention to meeting people. It is extremely difficult to juggle a plate of food, a drink, and the act of pulling business cards out of your pocket. The food table is also an excellent place for casually meeting people.

If you'd like to be more comfortable at mixers, arrange to attend with someone you know well enough. This is called a mixing buddy. When you arrange to attend with a mixing buddy, it's also a good practice to prearrange a rescue signal. It should be something simple that won't attract attention. Evrn Williams, Vice President of a telecommunications firm in Hawaii, and I used to just wave at each other as though we hadn't seen each other before and then we'd excuse ourselves and meet up at a safe distance from where we were.

up, there is something to learn or someone that I meet who will make an impact on my life.

The American Native Indians believe that "for every action, there is a reaction." I believe it is a personal responsibility to create a positive atmosphere wherever we are, but especially when we are in a business environment.

## **Mentors**

Another great way to keep your attitude in check is to have or be a mentor. Mentors are people who have achieved success and are willing to share their methods with someone who is starting out. This includes information on how to handle all the challenges we've just discussed and more. Because these types of challenges cross over into almost every business, your mentor doesn't have to come from your own industry.

If you don't know someone who would be a good mentor for you, ask a chamber director for an introduction. Meet with your mentor over coffee once a month and have an agreement that you can call occasionally when something specific arises.

Respect their time and don't overburden them with your challenges. Do let them help you keep grounded when you lose sight of why you began your business in the first place. Now, if you really want to change your attitude, mentor a student or someone who is newer in business than you are. Mentoring is a great gift to share!

## **When All Else Fails**

When nothing is working and you find yourself questioning why you ever decided to go into business (and believe me this does happen with 99% of all entrepreneurs



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If you have children in school, plan a fun getaway day each month. Go to the water slides, the zoo, the amusement park, or a museum.

You'll be amazed at your renewed enthusiasm when you return to the office the next day. Your mental cobwebs will be cleared away and you'll have a bright new perspective. You'll be ready to tackle anything!

Holidays offer wonderful opportunities for breaks throughout the year, when you are self-employed. A real perk in owning your business is to have the freedom to choose how you'll use the holidays to create special family memories. You will find that you can prepare for extra time off and not feel guilty about being away from the office. I must confess, though, it's hard not to check voice mail every day.

## Controlling Your Environment

Have you ever been in a room and someone walks in and everyone perks up and becomes more enthused? We all have an impact on those around us.

It takes less effort to be positive than it does to stay in a disgruntled mood. I believe it's all in a matter of our belief system and our frame of mind.

I enjoy walking into a meeting that appears to be quiet or the attendees are bored. I challenge myself to turn it around. I'll compliment someone, ask a question that will instigate a group conversation, begin introducing people, even when I don't know them or think of some way to stimulate activity. Invariably everyone walks away with a better attitude.

I can't remember the last time I was bored, whether I've been alone or with a group. No matter where I show

## Getting Started

When it's time to move away from the food, scan the room to see if you can find any wall flowers or, as Susan RoAne, calls them, "the white knuckle drinker!" You'll recognize them easily because they clutch their glass so tightly that their knuckles indeed turn white!

Take a moment to put your needs aside long enough to reach out to someone who is shy or nervous. When you extend yourself to others who have a greater need than yours, it will truly set you apart from the majority of those who attend these functions. You will feel more involved and it will serve to make you have a true sense of purpose at the function.

I remember what it was like to feel like a nervous wallflower, and how easy it was to feel as if I'd made a huge mistake by attending a function. I was always grateful when people approached me at an event. Over the years I've approached several people who didn't look comfortable being there and walked them around to introduce them to people I knew. They later said that if I hadn't done that, they might never have attended another event.

Do not judge anyone by a name badge. You have no idea what they do, who their life-partner or relative might be.

I once asked Chuck, an advertising specialty person, to meet me at a mixer so that I could introduce him to Lance's daughter Melissa. She and her father were organizing a golf tournament. Chuck could have had a nice order by furnishing the tee prizes, and I knew that they weren't working with anyone.

Unfortunately, Chuck came to the mixer before I arrived. When Melissa said hello to Chuck, he looked at

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her name badge. He only saw Melissa's first name, with reference to a company. Unimpressed he simply uttered a curt reply and then kept moving.

When I pointed Chuck out to Melissa later, she said she had already tried to meet him, but she didn't think her father would want to work with him. Melissa was obviously offended by Chuck's apparent rudeness and refused to even let him bid on their tee prizes. She didn't have to explain why after Chuck told me he had been distracted when he showed up and it didn't occur to him that she might be the contact I intended to introduce to him.

It's worth repeating: Never, ever judge anyone by their name badge, the way they are dressed or how they present themselves. This does not contradict everything I've said so far about how carefully you need to dress and develop your presentation because people naturally tend to make snap judgments. If you can refrain from jumping to conclusions, everything will work much more to your advantage.

### **Your First Approach**

Locate your first prospect and confidently walk up to them with an extended hand and introduce yourself. Some people find making conversation very natural.

However, if you're at all like I was when I was standing in that same spot for five minutes at my first mixer, thinking I should just go home, then talking with those you don't know can be terrifying!

Susan RoAne suggests that the best opening line is always "Hello."

As plain and simple as that may seem, it works. Then follow with a question that will begin a conversa-

- You'd rather cancel an appointment than go out the door.
- You can't find what you're looking for!

If so, STOP! It's time to take a real break and replenish your enthusiasm.

I made the mistake of going two years without taking a real vacation. A real vacation, getting away somewhere that doesn't involve any out-of-town family. My idea of a real vacation is taking walks on the beach, sipping Mai Tai's, and reading something nontechnical — in general, giving my brain a rest! On vacation, I don't want to deal with time schedules, rush around on tours, have to dress for dinner every night or listen to hours upon hours of conversation about someone's kids.

Now, I routinely take a three-day weekend and get out of town every three or four months. I walk away from my office on Fridays and don't return until Monday. I try to go in a different direction each time to keep the concept fresh and fun.

Entrepreneurs generally find it hard to turn off their businesses, but turn it off we must.

There are many perks in owning your own business and one of them is that only you are in control of your schedule. Take advantage of it. For a great break, simply follow your inclination to run and play, within moderation, of course!

When the first days of springtime fill your senses with delightful scents, take a midweek break. Convince a friend to take a long drive in a convertible or have a picnic lunch in a remote field. Spend the day reading a fun book in the park, nibbling on luscious grapes and freshly baked sourdough bread.

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Not all clients are worth having. Do yourself a favor and follow up on the ones you didn't get. You might just find out that they worked the consultant 15 hours a day and that they bound the consultant to a dollar amount, so there wasn't any extra money for the extra time. The corporation changed its mind five times, contending all the while that the changes met the standards of the clause in the agreement that said "to their satisfaction."

Life is too short to focus on what didn't happen. Next! Everyday is a brand new beginning. This is when your Victory Journal comes in handy (look at the end of this chapter for more information about how to create one). Reading through it will reaffirm the value of your services and the quality of your work. If you call a couple of your best clients and take them to lunch to get feedback from them, you'll find that by the time lunch is over, the lost client is no longer a major concern.

Now turn to your Challenge Journal (page 111) and enter the name of the company that chose not to hire you. Add the date, contact and any of the details that will help you analyze the situation and learn from it. Then, put the journal aside and start to work on your next client.

### **Break Time**

Over the years I have found that most of us have difficulty with motivation when we work alone for long periods of time. The effect is isolation. Mixing it up with other entrepreneurs can help you find creative ways to keep on going, but some times you just need to take a break. Do you ever experience any of the following?

- You begin your days, feeling lethargic.
- When the phone rings, you become irritated.

tion, "Are you a member of the chamber?" or "What business are you in?" One of my favorite follow-up lines is by Evern. She asks, "How do you generally find new clients?"

Pay close attention to their response, including their body language. If they're stiff, could you make them more at ease by telling them that you used to have difficulty attending these functions?

Keep your conversation positive at all times. Talk about what their business is and what Power Partners they need to meet to make their evening a success. Try to keep in mind all of the people you know that would be helpful to their business.

This is a good time to ask if they've heard about the Power Partner concept. Let them know that whatever their industry, other industries are doing business with clients they will want to meet as a prospect. By sharing information about which companies are moving, expanding, downsizing or making any changes, each person can drastically increase the amount of business they are able to conduct.

Refer to the list section (Chapter 18) at the back of this book to become comfortable with the potential Power Partners for each industry. The better they develop Power Partner relationships, the less time they will spend chasing business and more time conducting business.

Often I've asked a mortgage broker, "Would you mind if I call you next week with the name of a realtor that I know? I'm sure they'd enjoy meeting you." If you make a promise like this, be sincere and remember to always do what you promised.

When you're talking with a person, always stay focused on them and listen carefully to what they say. This

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one courtesy will make people more appreciative of you. The late Dale Carnegie discovered that when people listened carefully, others thought the one who listened actually had something fascinating to say. Conversely, those who aim to be interesting often aren't so considered. When you are interested in others rather than attempting to be interesting, you'll find you more effectively make contacts.

Pay attention! Do not let your eyes wander while someone is trying to talk with you. In my opinion it's embarrassing when someone asks a question, and the other person's eyes are darting all over the room. This is interpreted that they're looking to see who might be more important than who they are talking with.

When you accept a business card, really look at it. What does the card tell you about the person? Notice the paper and the colors they choose. Comment on something interesting or unique about the card. Don't just shove it in your pocket. It shows respect for the card, and the person who gave it to you, by handling the card as though you believe it is very special — which it is!

Get in the habit of putting their business card in your left pocket and keeping yours in your right pocket. This way you won't frustrate others by making them wait while you sort through a pile of cards, looking to find one of your own, making sure that it doesn't have notes written on the back. This will prevent accidentally giving away someone else's card as well, which is easy to do when you're nervous or distracted.

Always ask whom they might know as a Power Partner for you. Ask if you may call at a later date to give them information concerning names and numbers of contacts you believe will be helpful for them.

*"The last of the human freedoms is to choose one's attitudes."*

-Victor Frankl

- Chapter 11 -

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## **The Platitude is Attitude**

Motivating yourself to stay positive is difficult at times. The joys of owning your own business are occasionally dulled by circumstances way beyond your control. You can work for weeks to get a large client, then lose to the sister of the Vice President. You could be in the running for a long-term contract with a major corporation until they find out that you're homebased and go with a larger firm.

Things like this will always happen. I know this will appear simplistic, but sometimes when you don't get the client, it can be for the best.

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### **Stage Left**

One of the arts of Mixing it Up! is learning to spend less than five minutes with each person. This means you need to develop a graceful exit strategy. Remember how frightening it is for most people to be in a room filled with others they don't know, and how easy it is to feel out of place when they've been left alone. It often feels as though there must be something wrong with us, or we've been rejected. Keep that in mind when you leave others to meet the next person.

You might simply say, "Oh, I just noticed Carl across the room, and I need to catch up with him. Will you please excuse me?"

My favorite exit is to turn to see someone I know close by and then introduce them to who I was talking with. This involves both parties and allows me move on to meet someone new.

If you're not able to spot someone to introduce to the person when you've spent enough time with them, mention that by standing near the food, they will be more likely to meet someone they don't know, because that is where the most traffic is throughout the evening.

### **Getting Attached**

If someone gets too comfortable talking with you, you run the risk that they will end up sticking to you like glue. Several years ago, I offered to drive a new member in Elite Leads to a mixer. Nancy was very nervous about attending the function. When we got there, I introduced her to several people, but every time I turned around, I literally bumped into her. After the fifth or sixth time, it became a bit irritating, because she actually stood directly

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behind me. No matter how many people I introduced her to, she kept clinging to me.

I finally realized that it wasn't comfortable for her to walk up to someone and start a conversation. I led her to an area that was fairly private and asked if she had tried to meet anyone. Of course she said no. I asked what she thought might be the worst thing that could happen, and she said that maybe they wouldn't want to talk to her.

"On the outside chance that might happen, would you really want to know someone who wouldn't want to talk with you?" I asked.

"No." Nancy confirmed.

"On the other hand, if you don't introduce yourself to someone and they're potentially a Power Partner, you'd miss out on a great opportunity, wouldn't you?"

"Sure," she brightened.

"What if you could introduce them to someone that might end up leading to new business for them?"

Nancy smiled at the thought of being responsible for such a possibility.

So, one more time I walked Nancy over to someone I knew and introduced her. When we met up later she told me that she managed to meet several more contacts on her own. One was a potential Power Partner that she was particularly looking forward to getting to know better. She also mentioned that she was able to introduce a few people that she met earlier in the evening and it made her feel like she was contributing to their success.

Nancy was a quick study. Throughout the years I have seen her at various functions and she will typically have someone with her who has never been to a mixer. One time I jokingly told her that she should get a medal

going to be more mentally alert. Never schedule them right after lunch, because eating makes most people sleepy.

Make sure that you are back in your client's office within the first few days after you have completed the sale. You'll want to catch any errors or tweak the system to make it more efficient. It will also serve as the perfect time to ask for referrals.

## Time Management Worksheet:

### Tasks during business hours:

### Weekly Tasks Not in business hours:

Marketing	Fax Broadcasting	Clip Calendars from News	Master Mind Material
Return Phone calls	Reminder calls	Check Meeting Location & Dates	Press Notices
Attend Meetings	Prepare for meetings	Update Calendars	
Correspondence		Revise Forms Lists/Disks	

Here's a sample week: (Enlarge this or create your own!)

	Monday	Tuesday	Wednesday	Thursday	Friday
8am	Reminder calls	Master Mind Group	Leads Group	Sales Presentation	Marketing
9am	Marketing			Power Partner Meets	Thank You's
10am	Send Email/Fax	Marketing	Marketing	Marketing	A/R; Credit Referral
11am	Search A's & B's				Print Phone Pages
12pm	Take a Real Lunch	Break			
1pm	Follow-up/Leads	Meet Preparation	Meet Preparation		Return Library
2pm	Return Calls	Return Calls	Return Calls	Return Calls	Book Speaking Engagements
3pm	Clean Junk Drawer				Back-up Files
4pm					Check Inventory
5pm	Meet Preparation	Write Intros	Invoicing	Attend Mixers	Month End Reports

### Monthly Tasks:

Library Material  
Check Inventory:  
 Business Cards  
 Brochures  
 Stationary  
 Business Forms  
 Press Releases  
 Invoicing  
 Print Phone Pages

Write Articles  
 Newsletter  
 Set up Meetings  
 Write Meeting Intro  
 Chamber Directories  
 Thank You's  
 Mentor Check In  
 Month end Reports  
 Quality Control

### Weekly:

Leads Groups  
 Back up Files  
 Lead Follow-up  
 Power Partner  
 Clean Junk Drawer  
 Attend Mixers  
 Workshop sign-up

### Daily:

Marketing  
 Return Calls  
 Check Email  
 Send Fax

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
A,B	C,D	E,F	G,H	I,J	K,L	L,N	O,P	Q,R	S,T	U,V,W	X,Y,Z

## Mixing It Up!

I began to use a quality control questionnaire about a year ago. The responses have taught me a great deal about how the new members view my organization. It has also given me valuable insights on how I can continually look at improving my business. Keep up to date with your clients by developing your own quality control program.

Always follow up with new clients within a week so you're able to establish whether or not the sale has gone smoothly. See if there are any questions left unanswered.

Schedule educational programs that will give you a competitive edge. You can't afford to let your competition become aware of new techniques when you don't.

Also create a time to speak about your industry. It is the most rapid method of gaining visibility and notoriety. Book your speaking engagements until you have yourself scheduled for at least two or three months in advance.

### **The Calendar**

Mark off each task as it's completed with a felt tip pen. Determine where to assign the various appointments and tasks. Stick to it as a firm commitment! Refer to the calendar every day. Evaluate your calendar every week to make sure you have each necessary task scheduled.

Return your phone calls or work on your accounts receivable calls between eleven and twelve and between four and five. You'll find this is the best time to catch people in their offices.

If you are committed to meetings, leads groups, training and other functions, block out the times. As you can tell, you now have a full calendar. Try to have your demonstrations and contract presentations the first thing in the morning when you and your potential clients are

for helping so many people get comfortable with mixers. Nancy laughed and said, "I can't believe how much I missed out on all those years before I knew how much fun this could be!"

### **Cluster Busting**

Even though Nancy's example might appear extreme, it isn't. I believe that more than 25% of the people who attend functions really don't enjoy them because they feel it's too much of a challenge to meet people. When you extend yourself to make it easier for them, I guarantee that you will have a better time at the event. And imagine being remembered as the one person who made the evening more enjoyable for them.

At every event there are people who do everything in a group. I refer to them as a cluster. This is generally because they're not comfortable meeting anyone new, but it also prevents others from meeting them. To make it easier to meet anyone in the cluster, I'll turn to one of them (whether I know them or not) and I'll say, "Excuse me, but have you ever met Warren?" Of course your mixing buddy and you will trade off which one starts the conversation. You'll be surprised at how well this technique is received. Instead of meeting one person at a time, we meet several. By the end of the evening, we've managed to break up nearly every cluster we find.

### **Remember the Name**

Occasionally, someone will tell me that the main reason they don't like to attend functions is because they can't remember names. They feel it's too embarrassing to put themselves in that position. Keep in mind, you're not

## Mixing It Up!

the only one who forgets names.

When you have trouble remembering names when you first meet someone, remember anyone else you know who has the same first name. Start off by telling them your name, and they will generally follow with theirs. Don't make a big deal of it. Try using the name two or three times during your five minutes together.

My very first sales training class was with a Dale Carnegie instructor. One of the exercises was in remembering names. The person I was paired with was Hans Kadatt Kalsa. Give me a break! However, it's been more than 20 years and I have never been able to forget his name.

The technique is particularly effective with unusual names. We were told to create a story using the person's name. The story I invented had me sitting on my "Hands" in a hotel lobby when a page "Caddett" walked by with a megaphone, saying "Call Sir" in a very proper English accent. Therefore, Hans Kadatt Kalsa has never escaped my memory because of this vivid pictorial image.

### **The Party's Over**

Most mixers are about an hour-and-a-half to two hours in length. If you've been up since 5 am, you might find that staying at a function until seven or eight at night is a bit wearing. Maybe an hour is more than enough time to spend meeting new contacts.

If you become anxious to make your exit and you find that you are suddenly too tired to care that you're at the event, there are a couple of things you want to do before you take your leave.

First, find one of the hosts and thank them for the event. Make a comment about how you enjoyed the

them, you'll soon discover there are times when you'll reach more potential clients in their offices, rather than reaching their voice mail.

What tasks must be done during working hours versus those that you can do before or after hours? Most marketing calls (at least the ones in your time zone) must be done during business hours. Other tasks can easily be accomplished after your typical working hours.

Some examples include when you can return correspondence, prepare proposals, compile your month-end reports, write thank you notes, attend mixers, create invoices, enter payments, write and practice your introductions and run your month-end reports.

Whenever possible, schedule times during the week to be out doing presentations. Specific days and times mean that you'll be able to organize your presentations, so you can minimize the time you spend away from your office and the extra travel time.

Active marketing includes approach calls, developing Power Partner relationships with those who share the type of clients you are looking for, and attending mixers and professional organizations that will increase your wealth of resources. Make sure you commit to doing at least one marketing related task every day.

I call everyone in my database whose last name starts with an "A" or "B" in January, "C" or "D" in February, so by the end of the year, I've managed to clean up my database and often I'll renew someone's interest in participating in Elite Leads.

Be sure to leave enough room in your schedule to return calls the same day they come in. It is important that you are known as being reliable and accountable.



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to cut out the long days. It was extremely challenging.

I was so used to spending every waking hour working it was difficult to feel normal when I wasn't working. It was as though I felt guilty for not being at the computer.

One day I realized that I was reading my mail when I intended to make calls for potential new members for Elite Leads. I stopped what I was doing and pulled out my stack of lead forms and began calling to invite new guests to meetings.

That evening I outlined everything I had to do each month to make sure the meetings ran smoothly. Then I separated my tasks into several categories. First were the things that could only be done during working hours and then the monthly or weekly tasks. Next, I created a calendar and plugged each item into a specific area until everything was listed.

In the months that followed, I changed the calendar every month. I added and deleted tasks as I changed my priorities. Rarely does a month go by without having to add or delete items.

### **Creating Your Task List**

First, list the daily, weekly and monthly tasks you need to do to operate your business successfully. Be sure you plug in time for each item on your calendar. Leave room for appointments to be added as needed.

Before you place any task on your calendar, consider when it's most efficiently accomplished. For example, my approach calls are typically best placed during the afternoon on Mondays and in the mornings the rest of the week, but that may not be true for you. If you track your response rate to approach calls and note the time you place

evening. Go out of your way to be remembered positively.

If a particular business hosted the event, be sure to track them down and make a point of how you enjoyed getting to know about their business.

Always leave before you get too tired.

Refer to Chapter 11 on keeping a Victory Log and enter the event, what you experienced and specific relationships you feel you might be able to develop as a result. Especially if there is a particularly interesting account of the evening. If there were challenges, make sure you write about it. This practice will help you decide how to address the situation if it ever comes up again.

*“Time is the coin of your life. It is the only coin you have, and only you can determine how it will be spent. Be careful lest you let other people spend it for you.”*

- Carl Sandburg

- Chapter 10 -

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## **The Time of Your Life**

Why do some people seem to get ten times more accomplished while others always seem to run behind schedule in everything they attempt to do?

Five years ago I worked ten to twelve hours a day, most often seven days a week. Then, over time, I learned how to accomplish more during a 5-day week than I had previously done working those long hours all week.

The change began when a good friend, Jon Erlanson, challenged me to stop working weekends. It took me about four months to finally stop sitting at the computer all weekend long. Then, it took another four months

*“Success seems to be largely a matter of hanging on  
after others have let go.”*

-William Feather

- Chapter 6 -

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### **Following the Source**

Every time you meet someone new, a golden window of opportunity opens to turn new contacts into contracts and additional prospects.

At the very least, take a few moments immediately after the event to sort through all the cards you tucked in your pockets during an event. Note on the cards the date and place of the event (Walnut Creek Chamber of Commerce mixer, 6/8/00).

No later than a day after an event, you'll want to sort through the business cards you've collected. Make the most of your networking event by writing additional notes

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on the back of the cards or in your database. Comments like “firm rapidly expanding” or “needs a business plan.” will help you remember who to follow up with. Write anything about the person to help you recall the details at a later date. This can be anything from first impressions (“very graceful walk and commanding presence; wore a classy red suit with gold scarf”) to something specific you discussed (“knows my brother from college”).

These notes will to provide the details that in months or years from now will remind you of the person and enable you to recall specific details. Otherwise, important information will be quickly forgotten; the more people you meet.

If you’ve promised to refer your contacts to someone else, make sure you provide the necessary information or make the connecting call immediately.

Next, before your hot prospects get a chance to cool (or worse, be grabbed up by a competitor), call the ones you feel have the most potential. After reminding them of how you met, share any details that will help them remember meeting you that will make it easier for them to be comfortable with you. Because you’ve already established good will in your initial meeting, they’ll probably either be ready to set up a meeting or they might suggest a better time to follow up on the matter.

After you’re through with that call, dial another. Again, you are either rewarded with a commitment to begin a working relationship or you’ll receive an invitation to call at a more appropriate time.

When you call promptly, you’ve made the most of that quick-to-dissipate good will that was generated during the event. You will position yourself well ahead of col-

no other reason than to learn how to control your income and keep it consistent. By using the ratio, you can establish how many interviews and presentations you need to make each week reach your targeted number of closes a month. After a while you’ll be able to pre-qualify prospects on the phone to reduce your ratio drastically.

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arms up. Since you'll probably spend about four hours a day in it, the chair needs to be comfortable and support your back well. Invest in a wrist pad to bring your wrist to nearly the same height of the keyboard and reduce the stress placed on your wrists. It's also recommended that you buy a footstool. If your feet are slightly elevated, you have much less stress on your lower back. You won't walk away quite so fatigued after spending all day on the computer.

Don't get so fascinated and expert with organizing that you never quite get to the business at hand! Reevaluate your system a couple of times a year.

If you were to save five minutes a day through reorganizing one area of your business, it would add up to 21 hours in one year. That's an extra half-week!

### **Sales Ratio**

According to the National Association of the Self-Employed, the average is 20 dials to get one prospect. Once you know your ratio, then you will know how many calls you need to make so that you can learn to control the amount of income you choose.

For example, after 20 calls, you find that only five are qualified, so you schedule a presentation with those five. Out of the five, you close one, which means that your ratio is 1 in 20.

Say you want to make \$5000 a month. Now you know that to do this, you have to make 100 calls a month (100 divided by 20 [1 in 20] = 5 x \$1000 = \$5000 income). If it takes an average of an hour to make 20 calls, you'll have to schedule five hours a month or an hour and-a-half a week to make the prospecting calls.

Once you know your ratio, keep track of it, if for

leagues who wait weeks or months to call a new contact, or worse like the majority who never follow up on their leads. While you enjoy seeing your prospects grow warmer, theirs grow colder or disappear.

After all of the calls, send handwritten thank-you notes saying how much you enjoyed meeting them and the time they took to spend with you. A handwritten note in this day of faxes and email creates a special positive impression. This is also a good time to add an article you know they'd appreciate, preferably one you have written.

The better the event, the more likely it is that you will collect more leads than you can immediately pursue. Even if you follow up all of your leads quickly, you'll still want to refer back to them again months later. That means you need to develop a good tracking system.

Likewise, follow up on other promises to send them information. If you have a published article you wrote that will add to the validity to your doing business together, include it as well.

### **Tracking System**

As soon as possible, enter information about all the contacts that will be beneficial to you on a long-term basis into a database. You should have fields for contact information (name, address, phone, fax, email, website, etc.) when and where you met, and any pertinent information. The comment field will contain specific details you recorded either during the event or afterward to help you remember the person and their needs. I've found that having this information handy when talking with them on the phone later helps keep them fresh in my mind. Also, it will make it easier to tailor your future marketing efforts.

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Another very important field in the database is the “Call Back” date. If you promise to follow up at a later date, then being able to sort your database on this field at the first of each month (I designate the first day of the month for simplification) helps to prevent your missing an opportunity to reconnect with the prospect.

### **Storing Cards**

Whatever system you decide to use, if it works, it's the right one for you. After several attempts at creating a system, I found that keeping cards in vinyl window sheets, sorted by where I met them, is my ideal system. I've kept all the business cards I've collected in the past ten years in binders.

If a person appears not to be an ideal contact for me, I simply put their card in the binder in the section pertaining to where I met them without inputting them into the database. I find that I'll remember the event more often than the person's name. Having a date on the cards makes it much easier to pinpoint details about them. Later, someone might ask if I know a florist. I'll refer to the binders and look up the event where I remember meeting a florist. Sure enough, the card is easily found because I don't have to search through hundreds of cards and they're in the order in which I met them.

### **Converting Contacts**

While you're entering the beneficial cards into your database, call to see if you can convert the new contacts into Power Partners. Ask when they can take time out for coffee or tea. If they're particularly strategic Power Partners for you, try to make it a lunch date.

feel much better about returning to your desk knowing that it's neat and clean. I love multi-tasking. I have a second drawer dedicated to stuff I have to follow-up on sometime, but not necessarily immediately. When I make my calls on Monday, I go through the drawer and focus on getting it emptied.

Try to avoid having sticky notes all over your desk. If nothing else, create a separate file folder for them. Another great tip from Eve Abbott is to tear out articles from magazines that interest you. Then file them or keep them in binders for your future reference.

Keep a recipe box for the leads that you receive. Create separate sections for those that need more information, those that are complete and ones that need follow-up.

Sometimes chaos is order. On Monday mornings my floor is a total disaster! I stack things to the right and to the left behind me. These are things that have to be filed in their appropriate place, but rather than get up each time to file them, I wait until the end of the day and file them all at once.

### **Make it Easy**

Every time you discover something that will make your business run smoother, do it. It's the little things that have a tendency to wear us out, or make life a lot easier.

Invest in a headset. Most cordless phones have headset plug-ins and are under \$60. You'll save your neck from being stressed and leave both hands free to type.

My sister-in-law Jeanne points out that your chair “has to be ergonomic.” That means that with your feet flat on the floor and your knees at a slight downhill angle. Use the chair's armrests to reduce the stress of holding your

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engagement, I'll attach the letter, especially if it includes the address, times and other pertinent detail to the bottom of the calendar.

### **Organizing Your Office Space**

Whenever possible, items that you use on a regular basis should be within arm's reach. I use several binders for my various meetings and I finally found an oak desk that has a shelf just large enough to place twelve binders under the pullout keyboard drawer. It saves a tremendous amount of time now that I don't have to get up and walk across the room every time I need to refer to something from one of the binders.

### **Mail Call**

I prefer to pick up my mail after business hours. That way, I'm not wasting valuable productive marketing time on a task that can be done after hours.

"Always sort through your mail standing up," recommends Eve Abbott (not a family relation), of Organizer Extraordinaire. Eve warns her clients that sitting down while reading your mail makes it easier for you to get too comfortable and then you'll have a tendency to spend too much time reading something that otherwise you wouldn't look at. I tried it and sure enough, I save about an hour a week.

Sort your mail before you get it to the desk. Place checks on top, then invoices, and the correspondence you'll need to reply to. Have a folder for follow-up.

### **Getting Rid of Clutter**

Clear your desk before you quit every day. You will

Before your actual meeting, come prepared with an idea of what you want. At the same time, think about how you will be able to help them. Some questions to ask them are:

- Does their client base consist of small businesses, larger corporations or a combination?
- Is there anything they are aware of that might make their business run smoother?
- What Power Partner or outside service would help them operate more efficiently with tasks that are time consuming and energy draining?

When you meet, thank them for making time for you in their busy schedule. Make sure they know you appreciate the effort.

Don't be afraid to ask who they know who might be helpful for you. In all the years I've been conducting my business, I have never been turned down by anyone who I've asked for help. I once heard that by asking for help we're actually offering someone an opportunity to enjoy being useful. Most people have more of a need to give help (and be acknowledged for it) than to receive help.

If the meeting was particularly useful and you'd like to further your relationship, suggest another meeting or a telephone call at a specific time. It's too easy to let it slide if you don't treat this concept as a committed business relationship. It is also beneficial to you both, to call at the time a potential lead or future Power Partner becomes known to either of you.

It is important to develop ways of being remembered. The more qualified Power Partners are, the easier it will be to keep them consistently referring you business.

### **Projects**

I'm one of those people who are always working on multiple projects. I keep a file folder for each project in the desk drawer to my right where I can access them easily and make notes if someone calls. That way I eliminate having to file the notes later or having notes written on something like my message pages where they'll get forgotten the next day.

### **Create a Calendar**

I had to develop an efficient calendar system so I could run fifteen leads groups by myself, plus do all the marketing, paperwork and everything else it took to make Elite Leads a viable business. Some of the chambers in the area have two to five employees to manage the same number of members! My process maximized the effort I put into my business, affording me a way to reduce the number of hours spent running it.

Before I used this process, I worked 7 days a week, 15 hours a day. Looking back, I worked this hard only because I wasn't organized enough or motivated to work fewer hours.

Because creating and using a calendar is so important to your efficiency, Chapter 10, "The Time of Your Life," is devoted to this subject.

### **Commitments**

I also keep a calendar on the wall to my right. Anytime I make a commitment to speak or to go to an event, even if it's personal, I enter it immediately on the calendar. If I have tickets to the theater, I paper clip them to the calendar at the date of the play. If I'm booking a speaking



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the original message when necessary. The “RET” column logs the dates I try to return the call. That’s how I know after two or three times that it might be better to suggest switching to email.

The “RT” is checked off when they return a call that I made. That way I know they’re already in my database.

The “REF” is to help me track who referred a caller to me. When it’s possible, I start out the conversation by saying, “Warren gave you my number and I’m returning your call,” it’s easier for them to remember why they called.

On the first line, I enter their name. On the second line I enter their company name. I’ll write their area code if it’s different from mine, so it’s easy to spot local calls.

Their phone number is in the next column. Often, they leave a fax number as well. I just put a check mark to the far right and it’s more easily spotted.

Once I’ve called them, if they’re a prospect, I enter their information into the computer and put a wide marker above their phone number. This eliminates double entries in the database.

When the purpose of the call has been completed, I put a vertical line through their name and company. If there are only a couple of calls left on the page, I’ll put a paper clip at the phone number for a quick reference. I refer to each paper clip on Monday morning and try to complete the calls. When every call on the page is complete, I mark a large “X” in the bottom right corner of the page. All of the pages are kept in a binder. When the binder gets too full, I move pages out to a storage box.

Since I created this system, I rarely have forgotten or ignored any call.

*“The majority of men meet with failure because of their lack of persistence in creating new plans to take the place of those which fail.”*

-Napoleon Hill

- Chapter 7 -

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## Legendary Leads Groups

When you’re ready to obtain rapid results in marketing your business, join a leads group. It’s the most affordable method of developing visibility for your business regardless of what the business is.

At a leads group, you’ll meet the most active and professional people in your community. Like savvy members of the Chamber of Commerce and professional organizations, leads group members will know who is relocating, expanding, downsizing and who is being promoted or demoted. There are four additional benefits to leads groups:

- The primary purpose of the group is lead gen-

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eration for all members;

- Leads groups generally have fewer than 30 members. They get to know each other well enough to generate the best possible leads for each other;
- Great care is taken not to include any of your competitors within a specific group.
- The agenda will likely allow time for announcements, distributing flyers for upcoming events or asking for specific needs.

There are many different types of leads groups. Some are without leaders, gatherings over a meal at a more or less regular time. Some informal groups meet effectively for years; others don't make it past the first few meetings.

Many successful groups are franchises of national organizations run by a member who gets free or reduced-priced membership for handling administrative tasks for the group. Still others may be sponsored by a nonprofit organization (particularly the Chamber of Commerce) or privately owned like Elite Leads Business Development.

Though format differs, most leads groups offer at least a brief time for each member to introduce him or herself and state specific needs. There may be a 5-10 minute presentation by one or more members, so eventually the whole group gets to know each one's business details. Members share leads with each other, usually by writing them on printed forms with a copy retained by the facilitator.

Leads may be announced and probably will be tallied. Occasionally at the meeting, members report on leads that were especially useful to them. This acknowledgment of success is an important component of the group's support and motivation.

Leads groups that are part of national or interna-

receipt in the appropriate folder.

Each Monday morning go through the folder and pay those bills. If your cash flow comes up short, move the unpaid invoices into the next week's folder.

## Phone Messages

Again, any routine that will work is perfect. Jaclyn Zoccoli, who runs Elite Leads of Silicon Valley, uses a three-ring notebook. She makes copious notes when she retrieves a call from her voice mail and then checks each message off as she returns the call.

Some find the two-part phone message books are all they need.

I created a phone message page in Microsoft Word because I receive about 30 messages a day, I don't like having a lot of little pieces of paper to track. Here's an example of what my phone page looks like:

Date \_\_\_\_\_

RET	RT	REF	NAME	AC	FAX

The "Date" indicates the day the call came in. No matter how hard we try, we are bound to make typos and inadvertently transpose numbers. When I enter the information into the database, I include the date of the original call in the "Contact Date" Field. Then it is easy to refer to

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Rent, 300 phone, etc. When you write your checks, refer to the number. This will help your accountant prepare your taxes and help you identify areas that are out of balance compared to other small businesses.

About five years ago I noticed that I was spending about \$100 a month on copies. After the second month, I decided to buy a copier. I saved money, even though the copier cost more than \$100 because I was then saving the time it had once taken to drive to a copier, make the copies and drive back.

Make sure you track all other expenses including faxes, office supplies, postage, outside services (consulting, training, etc.), transportation, entertainment, printing, advertising or promotional materials, education, legal services, accounting, taxes, equipment, maintenance-service, maintenance-parts. I track parts and service separately so I'll know when it makes sense to buy new equipment rather than fix the old. Research materials (including trade journals, newspapers and business publications), miscellaneous, interest and insurance are also categories.

There are industry-specific expenses but if you're not sure which expenses are tax deductible, be sure to consult your CPA.

If you discipline yourself to enter your receipts every Monday morning, it's never an overwhelming job.

### **Accounts Receivable**

Jinny Chomppf of Simply Organized suggests having four file folders for your accounts payable, one folder for each of the four weeks in a month. When you receive the invoice, guesstimate whether you will pay it the first, second, third or fourth week of the month. Put the

tional leads organizations benefit not only from a network of contacts in other chapters but also the opportunity to visit those chapters when business takes them temporarily into another city.

Elite Leads is unusual in that the facilitator of the meetings owns the business full-time and has no other job. Each owner is constantly networking and helping members become better connected in the business community.

At the beginning of all Elite Leads meetings, the facilitator informs members of particularly useful upcoming events. A notebook filled with further information on events and other resources is passed around the table to allow the members further details about functions that might interest them. Between meetings, the facilitator may pass leads to members or encourage them to connect with each other. It is not just a social gathering.

Elite Leads is also unusual in that meetings take place in conference rooms, not restaurants. No food is served, so the focus is strictly on creating leads and helpful resources.

Many people belong to several leads groups. Their reasons for joining include connecting with other professionals, breaking the isolation many entrepreneurs feel when they spend too much time alone, keeping up to date with community events, having more people refer them business and a desire to help others. And, of course, increasing the number and quality of business leads received.

### **The Right Stuff**

A great way to discover leads groups is by asking your friends and associates. If they invite you to a meeting, you can ask why they joined and what you can expect from

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attending. Other leads groups can be found by calling your local Chamber of Commerce or checking the business listings in your local business journals. Also, check the list section of this book for further information.

Before you attend a leads group, ask questions and compare the answers with your personal needs. What types of businesses are represented in the group? How many people typically attend? Is food served or not? Does the group typically start and end on time? What rules govern it, and are these rules stringently or loosely applied? What is the typical group format? How many leads are regularly shared? How long are the meetings?

A lot depends on your industry. If you sell to larger corporations, finding a solid leads group is not as easy. Most leads groups have a mixture of members who provide soft services (massage therapists, chiropractors, house cleaning services, etc.). They also attract a number of representatives of multilevel marketing companies.

When you do accept an invitation to attend a leads group, go with an open mind. Always practice giving more than you'll receive. It truly is magic what happens when you adopt that frame of mind.

### **Preparation**

Review your event checklist and follow it. I'm amazed at how many people do not come with ample crisp, clean business cards for every member. If you have a brochure, plan to have about 20. Be prepared for twice as many at all times. You don't want to have anyone feel left out.

Remember that the purpose of attending is to get to know other professionals and become known for who you are. People don't generally act judgemental, but can

of working with a regular database consultant, a prepackaged database will be easier to develop for your needs.

### **Business Cards**

Though I talked about tracking business cards during the Follow-up chapter, here are some reminders. Always sort your cards by their usefulness. Not all cards should be entered into your database. If you know you'll never do business with the dry cleaner you just met, then file their card in your business card binder, for future reference, in the section pertaining to where you met them.

If you choose not to use a computer to track leads, use an index card system. Keep your cards in alphabetical order and have separate lists for each week's efforts so you will be able to refer back to the list later on. Staple additional index cards to the original to keep all transactions pertaining to each client in one place.

### **Receipts and Expenses**

Who hasn't heard about businesses that keep all their receipts in a shoe box? Some people don't even track their receipts at all! As several CPA's have told me, "If only the receipts were in a shoe box, I'd be happy and maybe I could figure out how to help the client."

Tracking is not that difficult. When you first begin your business, you can set up basic bookkeeping in Microsoft Excel, QuickBooks or Quicken. Which package you use doesn't matter, just as long as you use one.

I prefer Excel because I can customize the spreadsheets to suit my personal requirements. It is helpful to establish a numbering system for expenses. Identify each deductible area like 100 Payroll, 110 Payroll Taxes, 200

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Typically, ACT is adequate for most small business applications for people who aren't comfortable designing databases. ACT has one of the shortest learning curves of any software package I've ever used. What I don't like about ACT is that "what is, is!" If you want to add a new field to indicate whether someone is a member of your leads group, you can't. You can only enter such information into a comment field.

Symantec also produces FileMaker Pro. I upgraded to FileMaker because it could better accommodate my growing number of records. I didn't want to wait until I had 100,000 entries and then find that my training program and all the support materials were useless.

FileMaker would allow the database to reside on my website so I could use one database for all the territories of Elite Leads and be able to analyze each person's progress.

Then I was informed that I needed to convert to Microsoft Access because I anticipate that within five years my database will exceed 100,000. The consultant I was working with said that for the type of in depth application I was working with, I needed to work with Access or Oracle. The only reason I choose Access is because it is more widely used than others and I assumed because of that, it will be upgraded and be around longer.

One of the reasons FileMaker and Access are preferred is that you can add fields to them at will. You're not stuck with the first version you create.

If you anticipate having more than a million records, check into Oracle and CRS packages. Larger companies that have Management Information Services (M.I.S.) departments use these systems. If you don't have the luxury

eliminate the majority of any negative response by being suitably prepared. So use this to your advantage. The more you think about what you're going to say and do at a leads meeting, the more comfortable you will become.

## **Impressions**

Take notes about what each person tells you about their business. You'll want to refer to it when it comes time to generate leads. If you don't, you won't remember what was said an hour later. What do you think of each person's introduction? What do you assume about the way they conduct their business?

This is a great way to begin character styles. Look to see if they're relaxed or stressed. If they're relaxed, they are probably confident in themselves and their business. You can count on them pursuing the referrals you give them. If they're stressed, it might be their first meeting or a bad day. Refrain from judging them or referring valued leads until you know them better. Do they look people in the eye? Most people can't hide their insecurities well. It's possible that with a little encouragement from you, they might increase their self-confidence. Wouldn't it be wonderful to be responsible for helping someone overcome their attentiveness or shyness?

Do they pay attention to each person? If they're so busy shuffling papers to notice what others are saying, do you think they're going to be adept at paying attention to the details of doing business with your valuable clients? Probably not!

You might be meeting your next best friend or strategic Power Partner, so pay attention to everything everyone has to say.

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### **Introductions**

Every time you go to a leads group, you introduce yourself, even if you already know everyone who's sitting at the table. This gives you a great way to polish your introduction until it shines. To create your best introduction, consider what you want these professionals to know about you. What sets you apart from anyone else in your industry? Why will someone remember you?

The leads group introduction is different from the mixer introduction in that you'll use your name, your company and specific feature and benefit all within "8" seconds.

Yes, 8 seconds. That's the average adult attention span, and the more intelligent you are, the shorter the attention span is.

Where was I? Oh yes! When you introduce yourself at a meeting, you want to stimulate interest and stand out as being confident and professional.

So to review introductions. "Hi, I'm Susie and I'm a bookkeeper" is how most people introduce themselves. A much better version is something more intriguing like, "If numbers are not your favorite pastime, let me keep you straight. I'm Susie and I'll keep your books in order so you can spend your time creating more revenue!"

Basically, the difference is that you create a call to action. Make a statement that counts.

### **Generating Leads**

The obvious lead source is your contact database. You can also find plenty of information that can be converted to leads in newspaper articles about companies moving or expanding, people who are being promoted,

### **Database Systems**

A database is designed to help you keep track of everyone who is important. You can search fields for specific information like where or when you met or everyone whose first name is Mary. Once you get used to inputting the data, you'll wonder how you ever got along without it.

Your database is capable of creating reports that will indicate clients' activity. Therefore, you'll always notice when a client begins to slow down the amount of business he or she does with you. When you catch this early enough, you can make an attempt to retrieve their business. When you add a new service or product to your line, you can go back to inactive clients and possibly rejuvenate their interest in doing business with you.

Your database needs to accommodate these basic fields: first name (for addressing letters, last name (for sorting), full name (for rosters, lists, etc.), company, address, city, state, zip, area code, business number, extension, fax, email, voice mail, mobile number, contact date, call back date and comments.

Be sure you pick a software program that is flexible. If you're not sure what you need to accomplish with your database, then find a database consultant who will help direct you. Speaking from personal experience, it's a royal pain to switch software after you've spent a lot of time and money keying records into one system and learning how to use it.

There are endless choices for database tracking. Symantec's ACT is probably the most popular when the user is choosing a resource, rather than their company. With ACT, it's easier to track clients with features for call back, sorting, mail merge, report generators and such.

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Not being and keeping organized is one of the biggest pitfalls for small business owners. People who are naturally good at organizing and keeping records tend to have Introvert or Analytical personalities. Yet most successful entrepreneurs are known for being Amiables, Expressives and Drivers. This means it takes more of an effort for most entrepreneurs to create and keep order. That's not to say, with a little discipline some types can't become well organized. From my personal experience, I believe anyone can.

Remember, once your business is established and you are profitable, outsource the tasks that are challenging. Then use the time you save for marketing, you'll make much more than it costs to have someone do the things you're not thrilled about. In the meantime, having a system that works for you is vital to operating your business.

There are no right or wrong systems, only what will work for you. Rarely does someone else's system work for everyone. One benefit is that when you develop your system, you know exactly how it works.

### **Supplies**

Keep track of your office products by creating an inventory list in Microsoft Excel or any other spreadsheet. I track when and where to buy each item and how much it costs. This makes it easy to do price comparisons. If you have a list, you'll know when you need to reorder and also when to buy when because prices are better.

I review the inventory list at the first of the month. Some of my supplies, especially the printing, might take as long as two to three weeks to receive after ordering items. By reviewing the list, I can avoid major headaches caused by running short of supplies.

and a company that wins a contract or receives venture capital. Information about businesses that receive small business loans or happen to be struggling will be very useful to many members. Press releases, brochures, flyers about events are also leads sources. So are tidbits about people and companies that you hear about while attending events.

If the group provides a roster of the members, take time the day before to go through your contacts to find at least one lead for each person. Since most people show up empty handed to groups, you'll easily demonstrate your genuine interest in the success of the members. Believe me, you will benefit from this tenfold.

When you introduce yourself, be very clear and concise about the leads you are looking for. Keep it to one sentence, e.g., "I'd like to meet business coaches." If you add words of explanation, people will have a tendency to tune you out, and they'll forget what kind of leads you want. They might refrain from giving you leads because they'll feel confused from having too much information.

### **Creating Unique Leads**

There are four types of leads. The most common lead is the cold or anonymous lead. This could be information about an event or new company, but does not generally include anything specific. When you receive these leads and if you take the time to uncover the details, you will find that even these leads will generate quite a bit of business for you.

Warm leads might include a company's phone number, a contact and more specific information about what is going on with the firm. You might generate business if they're moving, expanding or downsizing.

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A lead is considered hot when you've already been mentioned to the contact. Since the contact expects to hear from you, you've just been saved about three steps of the sales cycle.

The fourth and best lead is the Nutopian Lead, in which you introduce a contact and a member of the leads group in person. Neil Kripalani introduced the Nutopian Lead to Elite Leads in 1995. He was the first one to put this into effect when he personally took one of the members with him to meet his client for coffee.

### LEAD RECORD FORM SAMPLE

TO: \_\_\_\_\_ DATE: \_\_\_\_\_

FROM: \_\_\_\_\_ PHONE: \_\_\_\_\_

CONTACT: \_\_\_\_\_ TITLE: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, ZIP: \_\_\_\_\_ PHONE: \_\_\_\_\_

◆ Neotopian Lead ◆ Power Partner ◆ I have mentioned you ◆ You may use my name ◆ Anonymous

Comments: \_\_\_\_\_

Many groups don't allow guests to exchange leads. Elite Leads freely offers leads to guests. This makes them feel included more rapidly. It also encourages them to reciprocate.

Before you give a lead, observe how people interact with others in the group and affirm that they conduct themselves well before turning over specifically valuable leads or Power Partners. Often I will provide a lead without the phone number, just to test the recipient's follow-through. If they don't call for the number, I will not give them this

*"Better keep yourself clean and bright; you are the window through which you must see the world."*

-George Bernard Shaw

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## Optimum Organizing

Most everyone believes they are organized. In actuality, everyone could improve in several areas.

I hear many objections to being organized. "It takes too much time," "My office is too small," or "I don't know what to do or where to start!"

Don't let these objections stop you! Organize anyway. It will save you time, and if your office is small, then it really needs to be organized. If you don't know where to start, then start at the beginning, and create a system that keeps track of your materials so that you can better manage your business.



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highly valued lead or contact. Though I might know a company that requires their expertise, I don't want to waste the contact on someone who does not bother to follow up on leads, and I don't want to abuse the source of the lead.

When you give a lead, always clarify whether the other member is free to use your name or if the lead source needs to be anonymous. If you don't know this information about a lead that was given to you, ask for it.

### **Joining Up**

Once you've found a group that suits you and your style, be committed to it. If the meetings are every week, make sure you're there. Don't let other meetings get in the way for any reason.

Choose your groups and pace yourself appropriately. Don't over commit and create a scenario where you become too stressed to do anything well. When you start your business, you may need to participate in three or more groups to generate enough contacts and resources. This will help you get your business up and running quickly. Yet you also have to balance this with the ability to follow up on your new contacts in a timely manner and fulfill your commitment to find leads for the other members.

Assume the responsibility for the quality of your lead groups. You should bring a guest to each meeting. In doing so, you will create a more valuable organization for yourself as well as everyone else. Plus, you provide your guests the opportunity to expand their businesses and contacts. Since you will benefit the most from strategic Power Partners, be sure to target industries that suit your specific requirements.

I've had a lot of members tell me that the only thing

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that prevents them from attending the meetings is when they have to meet with a potential client. This is the attitude of a successful professional.

Others have said, "It was the only time I could meet my client."

Sorry, I don't buy it! You let the group down when you don't attend. And you stand the chance of creating the impression that you don't stick to your commitments. Would that impression inspire anyone to give you a lead?

One of my long-term members won't give a lead to anyone who is not in attendance. It doesn't matter how hot the lead is or whether it's time sensitive. If for some reason you know you're not going to be able to be there, let someone who is going to attend know that you'll be absent. Never miss an opportunity to let others know that you are concerned about the group.

## Connectivity

Leads are the heart of a group's cohesiveness, but success revolves around the professional relationships that are built by nurturing and sharing a genuine interest in the achievement of each member. Get to know each member well. Meet with them on a regular basis and always use the time to brainstorm how you can help each other.

If the members don't get together in small groups, suggest a meeting for coffee with two or three. This helps them get to know you and to understand enough about your businesses so that they'll be able to easily refer clients to each other. Bring contact lists, business cards and any resource that might prove helpful to the others.

Ted Hayes arranges equipment leasing for companies. He met with Robin Fahr who creates campaigns

## Invitations

When you receive an invitation, please respond in a timely manner. Don't wait until the day of the event. Immediately put it on your calendar so you won't forget or double-book yourself. That way you'll be sure to show up for the function.

People put a great deal of effort into planning an affair. Part of the planning involves trying to figure out how many people will attend so there will be enough food. So not attending after responding can turn out to be just as rude as not responding at all.

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to keep up with what they publicly proclaim they do and they are not completely convinced that what they're doing is what they truly want to do.

If you are running late, be courteous enough to call. Let your appointment know how late you think you might be and offer to reschedule.

Avoid making an entrance. Every once in awhile, someone who is consistently late will storm noisily into our lead group and disturb everyone. I know they don't consciously attempt to disrupt the meeting, but they do. It's bad enough that they're late, but causing chaos by their entrance is extremely unprofessional.

When you must come into any function late, walk into the room in control. Don't make an issue of it. Sit down quietly and wait to see how you can get in stride with the meeting. When it's your turn to speak, apologize for being late, without an explanation.

Whether you accept it or not, we are judged by how we do or do not show up. Make each appearance count in your favor.

### **Acknowledgment**

Take the time to call and thank your appointments for the time that you spent together. Remember to mention something that you discussed. Try to come up with something that you can offer them, whether it's a lead, a Power Partner or information about an event.

You could probably count on one hand the number of handwritten thank you notes you received last year. When someone takes the time to give you a referral or to have a meeting with you, make sure you return the courtesy with a note.

using publicity to get recognition for her clients. Robin told Ted she couldn't imagine finding leads for equipment leasing. Then after talking for awhile, she thought of a company that manufactured freeze-dried flower systems for florists. She was designing a campaign for them. They went back to her office and she called her contact at the firm and introduced Ted to him.

Within six months, Ted's company was providing all the leasing services for the company, even though they were halfway across the country.

Remember that leads groups must have reciprocal relationships. Put your heart and soul into the group. Train yourself to think of the members when you're driving around, when you read an article in a newspaper or magazine or when you're at an event and you hear particularly useful snippets of information.

I watch members who are always giving. It amazes me how much more rapidly their business grows than those who are only concerned about what they're getting out of the leads group. One of my members, Warren Boschin, challenges me at every meeting to provide more leads than he does. Every meeting he hands out five to ten leads. How could I possibly not have as many leads to give as Warren when this is my full-time business?

The first year Warren's payroll business grew from six to sixty-six clients! I can honestly say that I don't know of any other small business that has grown at the same rate. Knowing him as well as I do, he isn't giving while he's thinking about what he's getting back. His motives have always centered around what he has to offer others. And at the same time, this is exactly what he inspires in the people who know him.

## Mixing It Up!

My father's mantra was that "anything worth doing is worth doing well." That certainly applies to leads groups. Treat the leads meetings with the same respect as you would your search for the client of the year. You'll be surprised at how often your best client will come from your lead sources.

Remember that everyone has the same number of hours and the same number of days in every week as you do. No one is any less busy than you are. Set priorities to insure your attendance at the leads meetings. When you get there, be a hundred percent present. Don't be thinking about lunch, what fax you forget to send or the email that you need to send! Stay in the moment; it's a fascinating way to get the most out of everything life has to offer.

### **Getting What You Want**

If you don't feel like you're receiving adequate leads, you might want to review your presentation. We have a tendency to be so close to what we say that we don't hear it as others might. Dare to ask other members what they understand about you and your business and you'll discover what others hear you say. After you listen to your words from their perspective, you'll find it easier to trade vagueness or industry jargon (which will be lost on them) for words that will purposely state your requirements.

The quality of leads that you receive is directly related to the quality the members perceive in you. So take the initiative to meet with each person in your groups to clarify exactly what and who you are looking for in a lead.

Don't forget to ask for leads. That's a Leadicious Rule (The List, Chapter 18). People aren't mind readers. They won't know what to give you if you don't tell them.

suggest that you both move to email. You can be more precise in your messages. If you have an unusual schedule, leave the details on your outgoing message. Don't leave people feeling that they're being ignored.

### **Answering the Call**

When you talk on the phone, be present. Don't get distracted by someone else in the office, your family at your home office, or the project you were working on when the phone rang. If your project is that important, don't answer the phone.

Most of us don't work with life or death situations in our businesses, so letting a call go to voice mail rather than giving the caller less than 100% of your attention is preferable.

If I am making marketing calls, I do not answer the phone for any reason. I focus on what I need to accomplish to make my business function smoothly. Each interruption will cost a loss of fifteen minutes minimum.

Don't hide behind voice mail. Deal with each call and move on. It's a waste of everyone's time if you use voice mail as a defensive mechanism.

Confirm all your appointments the day before. It serves to remind your appointment and gives you the opportunity to clarify when and where you'll be meeting. You'll be surprised at how many times they will tell you how much they appreciate your thoughtfulness.

### **Be Prompt**

Always strive to be early. Being late is a symptom that something is not quite right. A behavior specialist told me that those who habitually show up late struggle

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thought everyone tried to promote their business at mixers,” Sammy confessed.

“You’d be surprised at how many people don’t know any better!” I offered.

I had to admire Sammy for listening and following through. Today he operates his own successful insurance company. He told me a few months ago how much more he enjoys the events he attends.

### **Voice Mail**

When you leave a message on voice mail, make sure that you speak slowly and clearly, especially when you leave your phone number. It is so exasperating to have a potential client call and ramble through a phone number so rapidly that even after replaying it three times, it’s impossible to figure it out.

According to Clint Rood of Clientele, you should start with your name and number, saying the number at the same rate as the operator when you call information. Then leave a message that states clearly why you called. Do not leave just your name.

Repeat your name at the end of the message. Spell it if it’s not obvious, and repeat your number for clarity. Your message should never be longer than 30 seconds. Think your message through before you call so you’ll avoid droning on. If you have more than one point, state it up front. “I have two things I want to mention to you.” If you have more than two points, call a second time. More than two points at a time are too confusing.

Check your messages at least twice a day and make every attempt to return all calls the same day you receive them. When you occasionally get caught in phone tag,

### **Remember the Kudos!**

Thank everyone who gives you a lead. Jeff Rubin, of Put-in-Writing says, “Thank them three times!” First when you receive the lead, after you’ve contacted the lead, thank them again, either on the phone or by email and again after the lead converts to actual business. Thank them with a handwritten note and a gift that reflects the volume or financial remuneration to your business.

If the lead becomes a particularly lucrative client, please remember to acknowledge your benefactor with a gift that is equivalent to the amount of business that you have conducted. The general rule is between ten and fifteen percent of the initial transaction. However, it is not limited to money or gifts. Referrals work just as well.

When you put yourself in the other person’s position, it’s easier to understand why thanking them is such a great idea.

Have you ever given someone information that was extremely beneficial to them and they never mention it again? Have you ever caught yourself wondering what ever happened to the information?

There was a member in Elite Leads who was given a wealth of contacts for home loans. He initially promised to reciprocate, but as he became more and more successful, he completely forgot his initial intention. A few years later, the referrals slowed down drastically. Within one year he went from over thirty employees to one.

It is such a simple concept. Remember those who remember you! You’ll always come out the winner!

## Mixing It Up!

Sammy Sleaze is a character I created several years ago to personify individuals who try to sell someone on their concept or product at an event, drink too much, tell jokes that might offend an attendee, talk about religion or politics, or complain about the event.

Every time Sammy meets someone, he's looking all around trying to spot someone else he wants to talk with. His attention is always diverted elsewhere, and his eyes dart all around the room like a crazed lunatic. More often than not, when Sammy finds someone who will listen, he pulls out his brochure and attempts to read it word-for-word to his unfortunate captive audience.

After observing several unsuspecting Sammy Sleazes, I decided to take a risk. I approached Sammy and handed him a business card. He looked at it and said, "You're not Brad Warren!"

"No, I'm not!" I answered.

"Then why did you give me Brad's card?"

"I thought you'd like to give Brad a call to make an appointment with him. He works with people to help them with their presentations," I offered.

"I know how to do presentations!" Sammy objected.

"Maybe so, but you don't know when to do them."

I smiled and walked away.

Several months later, Sammy called. After clearing his throat several times, he said, "I just called to thank you for introducing me to Brad."

"Great, that means you've worked with him?"

"Yes, and I wanted you to know how much I appreciate the difference it's made in my business."

"What kind of difference?" I wanted to know.

"I never understood why people avoided me. I

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me to the mayor, Jerry Brown. The man was obviously uncomfortable and fumbled through it so poorly that we all felt uncomfortable.

According to Emily Post, if a woman doesn't extend her hand, the man shouldn't either. A proper handshake is when both bodies are squared off, not halfway turned, which is a defensive stance. Keep an arm's length between you. When clasping hands, both thumbs should be parallel to the floor with the web between the thumb and index finger touching on both hands. A count of three is sufficient. Always briefly look into their eyes to show your genuine interest in them.



**Sammy Sleaze**

*"Politeness costs nothing and gains everything"*  
-Stevenson

- Chapter 8 -

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## **Business Etiquette**

People who fit in best at business functions have style, grace and confidence. They know how to include others in their conversations. They take notice when people appear to be uncomfortable and they make an effort to help them overcome their discomfort. More than anything, they take it upon themselves to act as though each event is their private party and they are responsible for everyone's comfort.

But business etiquette covers much more than appearances at parties and events. Communications of all types, letters, email, voice mail and personal conversations require an awareness of proper etiquette.

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When my mother was in school, all students had to take an etiquette class. By the time I went to school, there weren't any available classes. I was fortunate, however, that my mother coached me in the basic concepts like when to say please, thank you and excuse me. She also taught me how to learn by observing others. I found that I become distracted from my nervousness by focusing on more important issues, like the other people who are present. I was amazed to discover how easy it is to become comfortable with a group of people by paying attention to their needs.

It's pitiful when people have poor manners or think they have to accept the bad manners of others. A caller asked Dr. Laura, who is a nationally syndicated radio host, what to do about a friend who embarrassed her by making outlandish statements at parties. Dr. Laura's response was "What makes you think you should try to excuse her bad behavior and why do you want to be her friend?"

### **Defining Etiquette**

The definition of etiquette in Webster's third college edition dictionary is "The forms, manners, and ceremonies established by convention as acceptable or required in social relations, in a profession or in official life."

The key phrase "established by convention as acceptable" is what most of us are not aware of. You need to know what is acceptable in business environments. It could cost you dearly if you're caught unaware of what is expected in a social or business environment.

In 1977, I read that a young man had gone through eight rounds of interviews and was invited, along with several other candidates, to join the executives in their corpo-

rate dining room. He was the most qualified and the favored prospect up to this point.

When lunch was served, the young man picked up the salt shaker and salted everything on his plate. He did not get the job. When he asked why he was eliminated, he was told that it was obvious that if he salted his food before tasting to see if it needed salt, he would more than likely make important decisions prior to having adequate information.

That might seem drastic to some of us, and we might not ever expect to find ourselves in the executive dining room, but I believe the example speaks volumes about how we say and do things without being aware of how others might perceive our actions.

How do we make a favorable impression? Being polite at all times seems obvious, but it involves more than the basic "thank you" or "please." It requires being conscious about the words we use, how we connect with people and how we involve everyone around us. I always revert to including everyone as though they are my best friends.

### **Who's First?**

There are guides about the etiquette of introductions. The rule of thumb, according to Emily Post, is to introduce the youngest to the eldest, the most junior (sales consultant) position to the senior position (president of a company) and the business person to the official (mayor or politician). Very few people are aware of the importance of business etiquette, yet good etiquette gets noticed. This offers you one more tool to make a good impression.

Practice your introductions until they become very smooth. At a mixer in Oakland, a man tried to introduce