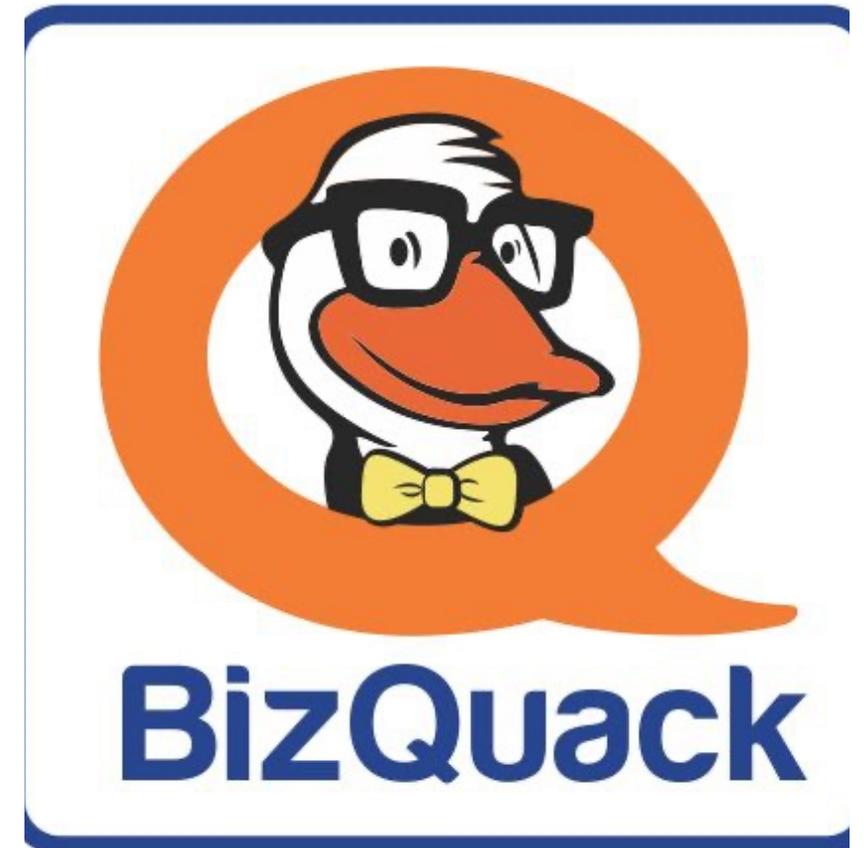




BizQuack

My promise to you today is to share a system which could become the center piece of your customer producing marketing system.

-
- ***First, let's set a base line foundation, and make some general assumption:***
 - Although my focus today is on marketing, growing a successful business requires a lot of different components and, in my opinion, the most important is the **Foundation Part of the Vision Based Business plan**. This requires fully developing:
 - Your Vision
 - Your WHY (Simon Sinek – Start with WHY)
 - Your story
 - Have a detailed description of your product/service
 - Have target market identification and validation
 - Your Value proposition
 - Your promise
 - Your delivery method



Before I go into the details of this system let me share more information about this system:

- It's totally under your control.
- it can be implemented at no cost to you, or, have a minimal cost to implement and use (under \$50/month)
- it keeps you involved with your current and past customers, your referral base and your prospects.
- It challenges you to constantly increase your outreach
- It challenges you to be more innovative as you grow.
- It's a process that will keep up with your business growth and can always remain a major part of your marketing effort.
- Maintain and growing your system will help you with your time management



- The Caveat: This system will not produce the results that I promised if:
 - You are not willing to work harder and more efficiently than ever before.
 - You are looking for instant gratification (results)
 - You are not consistent if maintaining the system.



- The goal for this session is to introduce a method for obtaining at least 60% of your revenue from your **People Management System**. Several years ago, I wrote a white paper sharing my belief that 40% of an 8-hour workday should be devoted to getting new clients.
 - If we expect to get 60% of our revenue from our **People Management System**, then we should spend 60% of our marketing time on this effort.
 - The math works out to approximately 2 hours a day.
 - Realizing that small business owners and commission sales people, which I consider to be small business owners, don't work an 8 to 5 day, I did not specify what time of a 24 hour day you should spend the two hours working on your People Management System.





- Your main customer sources are:
 - Personal outreach
 - Print Marketing
 - On-line marketing
 - People Management System
- A belief that your best prospects, in order of importance, are:
 - Clients who have already dealt with you.
 - One referred by a client who has dealt with you.
 - One referred by a trusted professional or friend.
 - One who has progressed through your People Management System.

- The main components of a People Management System include:
 - Filling the pipeline, (an ongoing effort to add new people to the system)
 - People information gathering
 - On Boarding new people
 - Communications
 - Frequency
 - Method of engagement
 - Community Building



Establishing a People Management System

4 Categories of Contacts



Soldiers

- The number of participants in this group should not exceed 20. Yes, family members, friends and neighbors are important, but they may not fit the following profile for people that belong in this group:
 - Successful in their business endeavors.
 - Are known for their business ethics.
 - Are active in their industry.
 - Are active in the community and have a personal relationship with you.
 - Have a desire to help you succeed in your personal and business endeavors.
 - Have a willingness to share advice and to listen to your ideas.
 - Have your best interest at heart
 - Are trustworthy.
- The members of this group will “fight” on your behalf and will always be looking for ways to help you grow your business.
- Additional participation for this group may be as follows:
 - Serve on your board of directors
 - Work on special projects

Supporters

- There is no limit to the size of this group. They support your business both as customers and or as a referral source. They also know the Foundation Section of your Vision Based Business Plan.
- This is the resource from which you will draw when a replacement is needed for your Soldiers.
- They are eager to stay in touch and willing to help as they can. I recommend adding family and close friends to this category.



Familiars



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- This group is made up of people that know who you are and know what you do but are not currently customers nor have they been a referral source.
- This group becomes a main feeder source for new customers and referrals.
- A special effort to share the Foundation part of your business plan is important.
- Sharing success and testimonials is important to this group.

Potentials

- By virtue of being in the “people business” we are constantly meeting people in a multitude of different settings.
- If possible, during that first meeting obtain a business card and ask permission to add them to your monthly value-based newsletter.
- The main work with this group is to share your business plan foundation and to establish a relationship.
- The objective for this group as well as the Familiar group, is to move them up the **People Management System** ladder.



Let's look at how you can fill the pipeline that feeds the People Management System

- The first step is to change your mindset from selling to **building relationships** and from **receiving to giving**.
- Relationship building requires some of the following attributes:
 - Be a great listener
 - Be authentic
 - Identify shared goals and values
 - Share some vulnerability
 - Be consistent
 - Share your story
 - Don't expect anything
 - Spend quality time
 - Seek opinions
 - Be empathetic



Giveworking

- **GiveWorking** is a term I coined to replace the term “NetWorking” which all of us are familiar with.
- When you attend a networking meeting your goal is to walk away with something of value.
- In **GiveWorking**, your goal is to give something, to help someone without having any expectations in return.
- The **GiveWorking** mentality is what we should have towards all the members in our People Management System.
-



Your People Management Base

- Adding to your base is an on-going process. Once you have reached a minimum number in your combined categories, (I recommend a minimum base of 300), then a weekly addition goal of 3 to 5 new people will provide a steady growth rate.
- Even if you personally know each of the people in your system, be prepared to have an open rate between 30 to 35 % when sending on-line information, i.e., a newsletter. If you want your newsletter read by 300 people, your total people management system should contain 1,000.
- This percentage will increase as you increase the benefits that you provide the participants. Yes, the top two groups will have a higher percentage of readership while the bottom two will have less.



Jump Start Your Base



• Make a list of everyone you know. Start off with their names and then work on obtaining their contact information and permission to add them to your mailing list. (In the appropriate category) A few possibilities include:

- Friends
- Relatives
- Work contacts
- Social and civic organizations
- Religious connections
- Customers, current and pasts
- Prospects
- Service providers

Outreach



- **Outreach**
- Before you start your outreach program make sure you have:
 - A smile on your face.
 - Belief in yourself.
 - Memorized the Foundation Part of your Vision Based Business Plan
 - Understand who you are targeting and where they are hiding.

Example of Sources

- Join an organization and be an active participant
 - Civic
 - Non-profit
 - Chamber of Commerce
- Take part in trade shows as a vendor, speaker, or attendee.
- Volunteer
 - In your community
 - A charity
 - Church/synagogue
- Ask your People Management participants for introductions



More sources

On-Line

- Select one or two sites that your prospects are most likely to use.
 - For Example: LinkedIn, if you have a following you may consider this as one method:
 - Go to your LinkedIn page and click on “My Network”.
 - Read their profiles and if you believe that they are a good candidate send them an e-mail with the following information along with a copy of your Value Based Newsletter.
 - Dear____ I would like to expand our connection. Attached is a copy of my Value Based Newsletter, IO also your name to my distribution list. Please call me at 602-989-1592 to set up a 10-minute Zoom meeting to share stories and explore possibilities.
 - No, not everyone will reach out. They may go to your LinkedIn profile before deciding. Those that do respond become good additions to your Familiars.
- LinkedIn offers a lot of other opportunities to make connections



Information Gathering

- Gathering information on your contact maybe called “Dialing for Dollars.”
- (Insert Strategic Duck People Management Information Sheet as an example)
- Basic information such as name, business name, phone and e-mail address are easily obtained.
- The next two important information gathering steps cover the product/service offered and their Value Proposition. The good news is that gathering this information is a great way to solidify a connection.
- Because of your special relationships with you **Soldiers**, completing the entire information sheet should not be a problem.
- The second group, your **Supporters**, may take a little more time and persistence but should be doable.
- With the 3rd and 4th groups, **Familiars** and **Potentials** the goal is to obtain the basic information needed to add them to hour list. As previously mentioned, because of your **GiveWorking** mentality, getting additional information is a great conversation starter.
- Another option is to send out an information sheet asking for your participants to update their profile.



On-Boarding

The process of welcoming new additions to your community

- For new additions consider the following:
 - Send a welcome e-mail
 - Send a welcome video
 - Send a copy of your last newsletter and tell them that they will be receiving future editions.
 - Send a handwritten note
 - Offer your cell number of any questions or support.
 - Deliver Value as soon as possible. i.e., offer a connection with another participant.
 - Offer a 10-minute zoom appointment to share stories.
- Not everyone will respond to your on-boarding efforts but they are a necessary part of growing a future community.



On-going Communications

- Remember that communications consist of three possible formats: in-person, on-line and in print.
- What **America Needs Now** Is my e-newsletter that goes out to all my groups. (insert copy)
- **Blogs:** Since I send two weekly blogs to my BizQuack membership I occasionally insert one and send to the entire list.



Communications for Soldiers



Monthly individual personal touches. (Zoom, phone or in person meetings)



Every other month a short report on successes, problems, and request for support/advice.



Every quarter gather the group together, via zoom or in person, for a one-hour meeting. Meeting to be held on the same day of the month and at the same time for consistency. Each members shares for two minutes about their business and then you offer a topic for discussion.



Referring to your completed information sheets:

Send print, special occasion cards (B-days, anniversaries, Holidays, etc.)

Refer business to them whenever possible

Send articles relative to their business or special interest.



Supporters

- Make an effort to complete the information sheets.
- Acknowledge special occasion using snail mail or on-line cards.
- Have a personal contact, in person, phone, or zoom every quarter.
- Education
 - Offer a 5 minute, You-Tube education session every month. Creating such a video is easy, free and does not have to be done professionally. Speak from the heart.
- Offer a 10-minute Zoom support call by appointment. Although only a few will act on this offer, they are aware of the offer and appreciate the opportunity.
- Encourage the participants to put together a 20-minute educational session, either pre-recorded or live which will be made available to all four of your categories. It is not a sales pitch although the presenter can add their contact information at the end of the presentation. Yes, you should preview and approve the presentation.
- Offer a weekly or every other week live, on-line **Giveworking** session.

Familiars and Potentials

- **Familiars**

- Giving and ongoing education is the key to moving this group to the next level.
- Send the monthly 5-minute educational video
- Engage the group by asking Questions such as: “What is your biggest pain point in your business today?”
- Offer an on-line discussion on the topic.
- Send a monthly challenge blog
- Share you Business Plan foundation

- **Potentials**

- Include them on your monthly You-tube educational video
- Send them the same monthly business challenge that the Familiars receive.
- As time allows, set up a 10 minute zoom time to share stories
- Encourage participants to share their biggest pain in their business growth effort.
- Offer an on-line discussion forum on this topic.

- **Please note, your monthly newsletter is the foundation of your communication system. Take the time to make it easy to read, informative, offer value and an action-engagement offer.**



Community Building

- A missing ingredient in most People Management endeavors is Community building.
- Larger firms have created a Community Building officer to their staff.
- A sense of belonging to a community is important not only for the business owner, or customers, but also for those that want to support business growth.
- Each of you may have a different image of the term community; it's people who care about each other, it may be a neighborhood, or a family or all your friends; it could even be your bowling team.
- Our goal is to create a community within the members of our **People Management System**:
 - We want to instill a Giveworking mentality, giving first before asking for anything.
 - Create a feeling of belonging, that they fit in.
 - Strive to have a satisfaction of individual needs.
 - Provide a flow of current and future experiences to have an emotional connection.
- Of all the components that make a **People Management System** work, the community building is the biggest challenge.
- Before we examine the “how to” of building the community, let's look at two of the biggest benefits:
 1. People are creatures of habit. When something is comfortable and satisfying it's hard to leave.
 2. If consistent value is offered, they will stay and tell others.



Building a Community within a People Management System

- A given has to be the high-quality customer service and support that your business offers.
- Engagement: The participants in your system must be able to connect with one another. Connectivity most often occurs either as a social event, a charitable event, or a business purposed event. The following are a few possibilities for connectivity opportunities:
- Consider forming an “Ambassador” group from your **Supporters**. They will help host and manage some of the following activities. Great Giveworking opportunity for them.
 - Have one or more open house events either at your home or business.
 - Pre-select attendees and invite them to a business issue sharing. This works well as a morning meeting with 5 to 8 participants.
 - Adopt a charity for your business and invite your participants to help, in person if possible or with donations.
 - Have a Christmas party for underprivileged children. Ask your participants to bring gifts and to help at the event.
 - Create “Giveworking” groups within your participants.
 - Create an optional business directory (with permission) include name, business name, contact information and products/service offered and value proposition. Update every few months and send to all participants.



Wrap-Up

- I know that there are a lot of “systems “that can be purchased that promise to do all the work for you.
- Most of them are categorized under the general term CRM. They vary in price from free to thousands of dollars with ongoing subscription costs.
- I am going to recommend that you implement this system without the benefit of a software that does everything for you. As your business grows you can consider such a system but for the solopreneur or a business that has not established a profitable People Management System, please do the work yourself.
- The most important benefit is your getting to know the participants in your People management System (yes, it’s possible to scan a business card and have it go directly to your CRM system that sends out your marketing material).
- I use Constant Contact for my e-newsletters. I have the four categories I mentioned plus a fifth called **Waiting Room**. I use that, as an example, when I am using LinkedIn as a source of new people, and they stay there until they make contact or asked to be removed from my e-mail list) To save time in the future I add their birthday, month and day to their profile.
- As an example, constant contact and other similar systems also have a lot of the automatic e-mailing system built in which also for the sending of Automatic Birthday cards, anniversary cards etc. but, until your combined lists are in the thousands, I preferer using a free e-card service that allows me to personalize a message.

