A step-by-step guide to take you from introduction to instruction

The Professionals' Marketing Tool Kit part 4

1. 24-48 hours before you meet

What?

- Prepare meeting objectives (and those are probably not immediate referrals or instructions!)
- Know your contact. Check their LinkedIn and website profiles
- Set up Google alerts for contact s and their organisation
- Ask colleagues/BD if there's any history

Why?

- You will come across as more professional
- You are more likely to get value from the meeting as you know what you are looking for
- Your meeting will have more structure and flow better

2. The Meeting

What?

- Listen, build rapport and find common ground
- Avoid the temptation to sell
- Let the contact do up to 75% of the talking
- Close the meeting with a call to action (an easy next step); don't just finish with warm words and no commitment/clarity as to what will come next

Why?

- You will start to build up trust and it's only trust that leads to referrals and opportunities in the future
- Your follow up will be easier (and better received)
- Ultimately you are more likely to win new opportunities and business

3. 24 hours after the meeting

What?

- Send a LinkedIn invite
- Email your contact a brief follow up note detailing actions agreed and suggesting next steps; keep the tone friendly and informal but be specific in terms of what you're suggesting (e.g. confirm the time, date and venue again)
- Write up a brief attendance note for colleagues and for Marketing to upload to your CRM system
- Unless requested to, don't send a brochure!

Why?

- Again, you will present yourself as professional
- You are significantly more likely to get the return you want from the time you invested in getting, preparing for and having the meeting

4. 7-10 days after the meeting (if you've still not had a reply)

What?

Once you've delivered on the promises you made in the meeting, email your contact again with a polite reminder you have done what you said.

This is not rude and won't be seen as a desperate sales tactic!

Why?

A lack of response is much more likely to be because of:

- Workload
- Poor email management
- Holiday
- Sickness
- They forgot
- Work got in the way

Than because they didn't want to hear from you.

5. 1 month later (if you've still not had a reply)

What?

Send a third and final email but, again, make sure your tone is friendly.

Why?

All of the research on this area proves the importance of follow up and that it's tenacity that wins new business

6. 3 months later ...

What?

If you get a positive response

Initiate another contact but make sure it's linked to something specific (an invitation to an event, the offer of an interesting introduction, sharing an article or report of interest or best of all, a potential referral).

If there's still no acknowledgement

- Pick up the phone and see if using a different means of communication channel works. If you have to leave a message, make sure you tell them you'll ring back (and by when)
- Make sure that you do exactly what you say next by when you said you'd do it
- If this still doesn't work, it's probably time move on ... for the time being!

Why?

Cultivating relationships that eventually deliver opportunities requires an investment of time and energy. They also require you to stay visible so you're front of mind when the right opportunity arises.

7. 6 months later ...

What?

Share something of interest via email or – better still – in hard copy, e.g. a self-published special report, an article of interest or relevant market intelligence.

8. 9 Months later ...

What?

As above!

9. 1 Year later ...

What?

Invite them to one of your firm's event whether that's formal (a seminar, roundtable or update) or preferably something more social.

SIZE 10½ BOOTS

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