



Introducing strangers to your consulting expertise is often a challenge but introducing it to people you already know can be downright painful. Have you ever wondered what opportunities you might be missing because you don't know how to speak to your friends and family about your professional practice?

## **Volume 4.7 Sales Predator or Good Neighbour?**

If you've ever felt like a predator while trying to introduce your firm and its capabilities to a personal friend or family member, you are not alone. Our lives often turn into silos where one doesn't integrate well with the other. We talk about work with our co-workers, about family with our relatives, and about neighbourhoods with our neighbours.

But what if the person that lives next door is an executive with a company just like those that your firm assists? Should you risk the potential awkwardness of mentioning your services to him? Given the small chance that he, or someone he knows, is buying services like yours at this very moment, is it worth the risk of feeling uncomfortable every time you see him in the driveway over the next 25 years?

Or what about your kid's soccer coach, the one with the accounting practice with many clients in your most relevant sector. Can you possibly introduce your expertise to her without making the next ten years of watching soccer an awkward endeavour?

When professional consultants try and cross-over social boundaries and discuss their practice with personal acquaintances, things can get weird. But there is a simple approach to turn "awkward" into "awesome".

### **Introduction or Referral?**

At this point, it is important to establish the difference between an introduction, and a referral. Although they have the same goals (awareness raising, positioning and qualification) introductions and referrals differ in terms of their source and impact.

An introduction can be offered by anyone that is aware of your position as an expert. It is simply the process of making someone aware that you exist, and are an expert at something. A referral is an endorsement by someone that has direct positive experience working with you on a relevant project. People who actively refer you are clients or former colleagues and are known as "advocates". A large

pool of advocates is a golden - but unpredictable - source of referrals and new business.

Before asking a friend to assist you with business development, understand what you are asking them for – an introduction, or a referral. Usually friends and family can only offer introductions as they have never actually worked with you on a relevant project (building your deck does not count). Technically, if you were to ask them for a referral (a form of endorsement) you would be asking them to lie on your behalf. Do you see where the discomfort starts to sneak in?

Think back to a time when you spoke to an acquaintance about the possibility of them “referring opportunities” to you. Did either of you feel uncomfortable and maybe back-pedal a bit? Change the subject perhaps? If you did, it may have simply been that they felt you were asking for an endorsement, when they were only really comfortable offering an introduction.

### **Why Would They Introduce You? And Why Would They Not?**

Friends, family and neighbours will introduce you to a stranger, mention your name to a colleague, or tell you about a potential opportunity if two things are in place. First, there must be some reward in it for them.

If you immediately thought about an extrinsic reward like money or material gifts I suggest you focus instead on social rewards like praise, recognition, and most importantly status. It is the difference between bribing and encouraging. And here’s where your position as an expert gives you a very tangible advantage.

When family or friends introduce a well-regarded expert, they gain a bit of the expert’s status simply via association. This is a powerful social reward.

Intrinsic rewards can also play a role. Pleasure from the act of making an introduction can be a strong reward on it’s own. We all know deal-makers that pride themselves on knowing who to call to “make things happen”. It’s good to know who these people are and to make sure they know who you are.

Second, there must be no downside.

We’ve already discussed the downside of asking for a referral from someone only capable of offering an introduction, but there are other possible landmines as well.

A consultant that is not an obvious expert is likely to be poorly understood and of uncertain value to potential clients - and quite possibly just a poorly-disguised unemployed person. This is a difficult and potentially embarrassing introduction for the introducer to make.

As well, poor sales skills demonstrated by the consultant - those based on persuading or convincing, rather than assisting, can also raise the level of discomfort for an introducer. Why would they introduce a consultant to their colleagues if they are worried that the consultant will simply hound them for business in an inappropriate manner?

Recognize that personality factors will always play a role in determining if an acquaintance will ever introduce you - and accept that many won't. In fact, just like a regular sales call, most potential sources of introduction or referral will never bear fruit - but don't be discouraged by this. Recognize this as the standard and carry on. It only takes one introduction to make it all worth while. It's just that it takes a lot of introductions to get to that one good one.

### **Making Your Expertise Known Within Your Social Circle**

To help inspire those that will introduce you, try and show them your expertise instead of telling them about it. For example, a press release or story about one of your prestigious speaking events in the media will get your friends and family telling everyone they know that they are connected to John Doe, the expert consultant.

Another tactic to use is to tell a story to reinforce understanding. When someone outside of your professional community asks you at a family gathering "So exactly what is it that you do?" reply...

"I work for ACME Consulting. We assist American financial services organizations to evaluate and train their sales force."

[You may be rewarded with a blank stare. If so continue on...]

"For example – recently we were approached by a financial services firm that was experiencing high turnover of their sales staff. They hired us to try and find out why. We did some analysis and identified a few issues around the compensation structure that was causing sales staff to leave. This was a surprise to the executive who quickly made some minor changes and now their sales staff turnover is half of the industry average. That saves them about \$150,000 per year, every year."

If appropriate you could then add "I write a lot about this stuff. Would you like to receive my next article?"

Try and have one or two of these stories ready to go before every social event.

## **Sometimes You Have to be Direct**

Let's go back to our soccer coach example. Here's how you should handle that one. In a quiet moment, at the end of practice, approach the accountant/coach and say:

"Coach, I know that you are aware that I am little Jimmy's Dad, but I'm not sure if you know that I am also a management consultant that specializes in assisting financial services firms to assess and optimize their sales force. It is my understanding that your company does a lot of work in that sector. Now I'm not sure if your clients ever face sales challenges but if they do, and they ever look to you for direction, please feel free to call me. I may be able to help them, or else direct them to a more appropriate source of assistance. Here's my card, and would it be alright if I forward you the occasional article that I write on the subject?"

If the answer is "Sure" then you have just automated the process of assisting her, to assist you.

If the answer is "Thanks but I already get more e-mail/mail than I can read" then you thank her for her time and carry on. Even though she is not in your system you have made her aware of who you are and what you do (the most basic goal of any introduction) and have done so in a respectful and innocuous manner.

And again it's always possible that she will reply "You know that's interesting because I do have one client that is struggling with high turnover in their sales department and it's driving them crazy. Can you call me about this tomorrow?"

## **Don't Make Yourself The Constraint**

If you do a newsletter, add friends and family to your list. They may not be your target audience but they will certainly gain an understanding of what you do and for whom you do it. Invite them to hear you speak if that's appropriate (note that it's more important that they know you are an in-demand speaker, than actually hearing you speak).

If you cannot briefly, accurately, and confidently communicate your unique position in the marketplace as an expert, you can be certain that your friends, family, acquaintances and neighbours will not either. A wise old sage once told me:

*"I make sure my friends and family understand what I do, and for whom I do it. Then, if they decide they want my assistance, I wait for them to come to me."*

You should too.

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