

# The ADVISOR

Volume 1, Issue 1

The Journal of the Association of Independent Consultants

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The ADVISOR is published by the National Headquarters of the Association of Independent Consultants (AIC).

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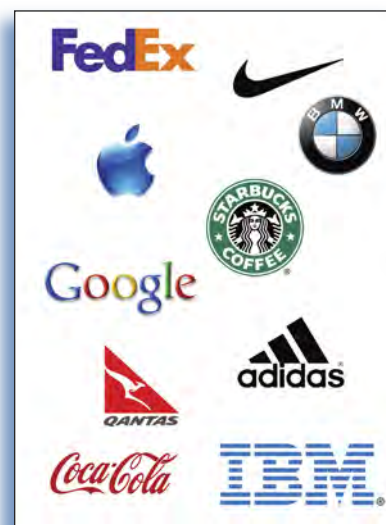
## Branding and the Smaller Organization

by Keith Thirgood

You all know that the big guys invest big bucks in marketing their brands. Whether it's Pepsi, GM or FedEx, everything they do goes toward making their brand irresistible to their target market. Without deep pockets, what's a smaller business to do?

There's plenty of advice out there. Most of it contradictory. Many advisors will tell you, "Forget branding, that's only for multi-nationals. And even multi-nationals shouldn't be doing it!" These folks preach the mantra of direct sales. For them, every piece of marketing must lead directly to a sale, or it's not worth doing.

And then there are people who'll advise you that what you must do is build a brand. They say only



with a strong brand do you stand any chance of success. They show you examples of large companies successfully implementing brand strategies. They use these well-known successes to prove the value of focusing exclusively on brand building.

I believe the truth lies somewhere between these two extremes.

As a small business you need direct sales. You can't wait for brand building to begin providing income, a year or two down the road. Few of us in small businesses have the cash to last that long without income.

However, if you don't work on building your brand, you'll be forced to continually feed the sales funnel.

A strong brand encourages customers to seek you out. A strong brand is easy for your clients and people in your network to refer to others. With a strong brand, you need no longer rely exclusively on being proactive marketers. Your market will begin to come to you.

How do you achieve that balance between branding and direct sales?

I don't think the two sides of the equation are as antithetical as they're made out to be by their respective proponents. There's no reason why everything you do in your direct marketing, cannot be done in such a way as it adds to your brand.

Many boosters of direct marketing for small business would have you believe that you should eliminate everything from your marketing that does not directly lead a prospect to the sale. Logos, graphics, wording that is not directly sales related, and even attractive layouts are often called superfluous eye candy. You're ordered to ruthlessly eliminate them. They're all considered elements that get in the way of your prospect's inevitable march to the sale.

Horsefeathers!

The bare-bones, benefit-laden, frankly breathless copy of many direct marketers is the antithesis of brand building. But it doesn't have to be.



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Many of the tools used by graphic artists, advertising agencies, and others involved in the branding arena can be used to take the hard edges off many direct marketing approaches. In the process, many of these branding techniques will actually improve the results of your direct marketing approaches.

You need to look at the nature of your business and your industry to see if long-term branding will be of value to you. Some industries are naturals for direct marketing and the brand will always be secondary. However most businesses, in most industries, will find that combining branding with their direct marketing efforts will pay off big time in the long run.



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## Getting the Reader's Attention

by David Gargaro

Getting your reader's attention is a big step in achieving your goal. After all, if they don't read what you wrote, what's the point? Whether you are trying to sell a product or introduce your business, you have to get the attention of your intended audience. So how do you accomplish that?

1. Outline the significance of your subject. If the importance of your topic can catch the reader's interest, then he or she will want to know more about the topic and will continue reading.
2. Start with a popular quotation, slogan or saying. Use a well-known quote if it states your point of view more efficiently and effectively than your own words. Make sure that you identify the source.

3. Insert a startling statement, but do not use an insult or falsehood. A surprising statement or little-known fact can effectively grab the reader's attention.
4. Ask a question that encourages the reader to think. If you can get the reader to think about a possible answer, then he or she will continue to read to see if you provide the answer to your own question. Rhetorical questions can be effective as well.
5. Start with a generalization that falls within the scope of your subject. You can then narrow it down with a more specific statement so that your reader understands where you are headed.
6. State a challenge to a popular opinion. You may hit a nerve with your readers where they agree or disagree with this challenge. Make sure that your content backs up the statement.
7. Introduce your topic with a definition. Using a definition is a good idea when introducing an unfamiliar term to your audience.
8. Open with a personal story or anecdote. People enjoy stories, but keep it short and make sure that it relates to your point. Stories can emphasize how your topic has real meaning, and can come from your life, the media or an event involving someone you know.



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### CONSULTING TIP

While being exceptional in your field is a good thing, it doesn't mean your skills will still be highly valued a few years down the road.

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## Get Mad and Get Going

*by Dr Jill Ammon-Wexler*

Feel like your life is stuck in a rut and going in circles? Maybe the time has come to put some powerful e-motion to work. Emotion is actually one of the most powerful energies we humans have. It IS literally mental energy in motion. And certain emotions are so powerful they can instantly change your life.

What human emotions have such power? Anger and love especially when fueled by the fire of passion intense e-motion.

Not much needs to be said about the ability of passionate love to change your life overnight. But how about passionate anger? Although passionate anger can be very powerful, its energy is not really bad or good. It is simply energy in motion.

Actually it is what you choose to DO with your anger that makes it a positive or negative force in your life. And as with any powerful e-motion, you can put it to work in both negative and positive ways.

If you have ever been captured by an uncontrollable rage, you have experienced a piece of the outer limits of what anger can become. On one level it is behind crimes of passion - and on the other hand, it can fuel the ability to strike back at a threat and survive.

But anger can also be a powerful force for personal transformation. Here is a real life story about the power of anger. A man in his late twenties woke up in the dismal surroundings he called home a very cheap hotel room with a sagging mattress, a flea-bitten armchair, a small table with a habit of losing a leg, and a single window opening onto a view of the next door soot-covered building.

He put on the shorts and socks that had dried on the chair overnight, pulled on a pair of rumpled trousers. Then he sank back down onto the edge of the mattress, rubbed his swollen, bloodshot eyes, and sighed.

Life was not going well for this young man. He was marginally educated and young - and his life was simply not moving in a positive direction. He bent over to put on his shoes, but instead threw one at the wall. His anger and frustration began to build, and he threw the other shoe at the wall.

His face blazed crimson. The frustration and self-loathing that had been building within suddenly erupted like a volcano. This is enough, he shouted. Enough of this disgusting lifestyle.

Today this same young man owns a multitude of successful businesses, and is highly regarded by millions of people. His initials are TR. Sound familiar? Tony is an example of how you can use passionate anger to literally turn your life around on a dime.

You too have choices about how to use the energy of anger. Suppose, for example you are struggling to make ends meet, like many people today. What can you do?

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- You can stuff it. But if you do so the problem will not go away. What repressed anger does is to make its home somewhere in your body and create more stress. Ever ask someone What's eating you? Your intuition picked up on the repressed anger setting them up for ulcers, colitis, and other digestive disorders.
- You can turn it against others. Not much needs to be said about how counter-productive this strategy can be.
- You can work it out physically. The energy of anger can be transformed into physical energy, which is far more beneficial than stuffing your anger. Some common outlets are running, working out, etc. But this is not necessarily a lot of fun.
- You can use it to motivate yourself. Think about what Tony Robbins did in his life. It is the same thing Eleanor Roosevelt did to transform herself from a homely, insecure young girl to a world respected leader. If your life is NOT what you want it to be, start by getting mad enough to take action.

Remember: Anger is just an emotion. But passionate anger can become a highly motivational and unstoppable energy in motion. Put it to work in your life as a positive force to lose weight, get a new job... whatever you NEED to make yourself happy. Just waiting for \*it\* to happen does NOT work, and never will.



*Pioneer Brain/Mind Researcher, ©2009 All Rights Reserved. Jill is a renowned brain/mind researcher, and was one of the first in the world to introduce brainwave training to the corporate world. She is the co-developer of the web's first brain gym – [quantumbraingym.com](http://quantumbraingym.com)*

# Psychological Factors Getting in the Way of Tough Regulation?

by Robin Ford

**B**road brush, we all know why the global financial system is (still) in crisis - poor governance, sub-prime mortgages, “financial weapons of mass destruction”, soaring debt (aka living beyond our means), highly leveraged financial institutions, lack of transparency, ignorance, willful blindness, hubris, greed, and so on. These issues have been extensively scrutinized in the past year or so.

Contributing to the crisis, key global regulators also failed to act soon enough to mitigate the risks arising from this “toxic stew”.

To pick one example, before August 2007, the UK Financial Services Authority was taking steps to mitigate some of the risks using tools like “dear CEO letters” to the banks, warning them to get to grips with their derivatives and securitized debt portfolios. It was also pushing regulated entities to up their game on risk management - with some success.

Nevertheless, the FSA did not do nearly enough.

As the FSA’s March 2008 report ([www.fsa.gov.uk/pubs/other/nr\\_report.pdf](http://www.fsa.gov.uk/pubs/other/nr_report.pdf)) on its failure adequately to supervise Northern Rock Bank explains, supervisors and managers in the modern regulator must be highly

trained and skilled; able to recognize and address important emerging risks quickly and assertively; able to exercise good judgment in fast moving, highly complex situations; and able to engage with and to challenge regulated entities at the most senior level and ensure that important compliance issues are suitably addressed.

Lack of supervisory skills and inadequate resourcing, as well as process and management deficiencies, were important causes of regulatory mistakes in the case of Northern Rock. But these factors were to some extent limited to the team managing Northern Rock, and they fail fully to explain why the FSA did not take the wider toxic stew of risks sufficiently seriously, and take tougher action, sooner, with other global regulators, across the regulated sector.

Recently, Lord Turner, the FSA’s Chair, has talked about some of the wider failings of the FSA ([www.fsa.gov.uk/pages/Library/Communication/Speeches/2009/0121\\_at.shtml](http://www.fsa.gov.uk/pages/Library/Communication/Speeches/2009/0121_at.shtml)). However, one factor, that the Turner Review ([www.fsa.gov.uk/pages/Library/Corporate/turner/index.shtml](http://www.fsa.gov.uk/pages/Library/Corporate/turner/index.shtml)) does not address, is regulatory culture and psychology. This is an aspect of organizational behaviour that is rarely covered, or covered in any depth, in reports dealing with the inevitably complex reasons for regulatory failure.

Rightly, regulators hesitate to impose measures without good evidence and a persuasive cost benefit analysis. Objective analysis may rightly result in a reasonable decision to do nothing (or to take some lesser action). However, in my experience, regulators (like all people) may also tend towards caution for emotional reasons, often unrecognized. To put this another way, while poor decision making may be caused by poor analytical skills or inadequate information, psychological factors may also come into play, particularly when the issue is difficult.

Markets can behave irrationally and so can regulators. Regulators can irrationally succumb to the hope that things will sort themselves out over time if left alone. They may choose to look on the bright side, for emotional, rather than rational reasons.

In addition, people want to “fit in”. They do not want to rock the boat or be viewed as killjoys. They want to avoid confrontation. Those who argue for tougher or quicker action may find that their views are rejected or even scorned by others (and so they become even less willing to stick their necks out).

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This becomes a more important risk to good decision making to the extent that regulatory supervisors come to view their relationship with regulated entities as some sort of “partnership”.

I am a firm convert to the FSA’s outcomes focused and risk-based approach. But the management of people in the modern regulator has not entirely kept pace with new thinking on regulatory approaches. This has contributed to “light touch regulation” by the back door (ie, not as a result of a deliberate policy choice by regulatory leaders) and what may (rightly or wrongly) be perceived as regulatory capture.

Regulators need to pay much closer attention to their regulatory culture, including the psychological factors that can interfere with good judgment. Getting the people side right (and helping regulatory staff to take tough decisions as objectively as possible) boils down to appropriate leadership, good people management (including support for disciplined decision taking), hiring the right kind of people, and ongoing (never-ending) training and development.

We also need better mechanisms to support the regulator in making the tough decisions - beefing up the involvement of central banks in systemic risk scrutiny; strengthening the policy units of Finance Departments so that they (and their political masters) can play a larger, more informed, role in systemic issues and in regulatory oversight generally; and finding better ways for regulators to work more effectively together. I also support a sort of whistle blower function in regulators to allow regulatory staff, in those rare cases, to bring important concerns to the attention of senior management without the stigma of disloyalty.



*Robin was Chief Counsel, Insurance at the UK Financial Services Authority and Executive Commissioner at the BC Securities Commission. She’s now an independent consultant in the areas of governance, regulatory reform and administrative justice systems, working from Vancouver, BC.*

*Reach her at 604-720-5554.*

## Hi! What Do You Do?

by Helen Walter

So often I read marketing and sales guru articles that recommend — no, demand — that you have an elevator speech. Sometimes they call it your USP, your Unique Sales Proposition.

The gurus say your USP should answer the following questions:

- What do you do?
- Who are you?
- What are the primary benefits to your service/product?
- How do you provide those benefits?
- Why would someone want to do business with you?

So far, so good. These are laudable things to communicate. However, language and timing are important.

I’m all for having a USP, (although my partner and I prefer creating a UVP, Unique Value Proposition). We substitute “Value” for “Sales” because when you focus on sales, as you think about and develop your proposition, you’ll focus more on your need to sell; not so much on the value you bring to your clients.

Our advice to clients, regarding their UVP, is to consider questions like, “What primary benefit does your client enjoy once they’re working with you?” –



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and “As a result of what activity?” These questions are about your prospect, not so much about you.

A UVP is important because it helps focus your marketing thinking. You use it to judge the worth of any of your marketing initiatives. Does your marketing live up to your UVP.

So what about using your UVP as a 30-second elevator speech? I think not.

This is a quote, word for word (except for the com-

pany name), from a well-known marketing guru who, when asked what they say about themselves at a social or business function: “We save people time and money by keeping them informed, inspired and directed toward their personal and professional best. We publish ideas and information, provide support and secure product and service discounts for our members. “Successorama” strives to make the navigation of change and uncertainty not only easier, but more fun!”

I don’t know about you, but by the second sentence,

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#### **Helen Walter, Senior Visioner, Capstone Communications Group:**

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#### **Keith Thirgood, Marketing Advisor, Capstone Communications Group:**

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- After one week, participate a webinar where you share the results of you homework with other participants and get individual feedback and coaching.
- After another week, participate in a final webinar to fine-tune your’ efforts.

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I'm regretting I asked. It's too much, too soon, too aggressively presented – a whole lot of stuff coming at you at the speed of a slapshot!

In a networking situation, people don't want a sales pitch. They're just making conversation. When someone asks you what to do, it's time to romance them. And you don't romance someone by bringing out the resume.

What if "Successorama" had said, "We help business people reach their goals." If the prospect has been struggling to achieve certain goals, they might ask, "What kind of goals, and how do you make that happen?" Now, with that show of legitimate interest Successorama has an invitation to keep talking and reveal more.

However, the prospect's question doesn't give Successorama permission to pitch.

In our own case, once we've said, "We help business get more business", (and they've asked for how), we might say, "You know all those really effective websites you see? We create them." Or we might say, "When a company, like yours, isn't happy with the results of their marketing, we help them figure out what's not working, and make it right."

Seduction, not assault.

The next time you read some advisor preaching aggressive means to reach your goals, pause and consider: Is this the way you want to be approached when you have a need?

Happy seducing!



*Helen is Senior Designer, Capstone Communications Group, a marketing company producing effective communications tools like brochures, websites and advertising, as well as dishing out strategic and tactical marketing advice. She's also a popular keynote speaker on effective marketing. Reach Helen at 905-472-2330 or [www.capstonecomm.com](http://www.capstonecomm.com)*

## Avoiding Bad Clients

by Robert Middleton

Everyone wants to attract the ideal clients. But very few of us know how to identify them. And what's even more of an issue is that we don't know how to identify bad potential clients.

As a result, we waste a huge amount of time and energy in the marketing process. We spend too much time speaking to and meeting with prospects who either will never buy our services or, if they do, the experience and results will be disappointing.

So how do you quickly size up prospective clients?

You divide them into eight types that distinguish their dominant approach to doing business. When you clearly see these types, you'll know how to proceed.

I learned the system of types outlined below from Jerry Vieira, of The QMP Group, at his very stimulating presentation today at the IMC (Institute of Management Consultants) Confab in Reno Nevada. I know you'll find it very useful.

Here's Jerry's "Approach to Business (ATB) Scale"

### 1. Stumps, or Stuck-in-the-Mud-People.

These are people with very limited points of view. They know what they know, and there they sit. They aren't interested in new ideas or changing the way they're doing things. (Problems? What prob-

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lems?) As a result, they are very unlikely to buy professional services.

You will waste your time if you try to convince these people and educate them about your services. They may show some interest, but ultimately they really don't care. If they never ask a meaningful question or keep giving reasons why your ideas won't work, move on and don't bother following up.

## 2. Takers

These prospects are experts at stealing concepts and ideas. It's hard for them to admit others have a better idea than they do. So, with little compunction, they'll lift your ideas, pass them off as their own and never give you credit.

If you're meeting with a taker, they'll tend to grill you and take very good notes. They'll ask you to send articles, models and other materials. Beware if they ask you for a proposal too early in the process. Don't do it. They'll take your methodologies and get their cousin, Fred, to do the project using your approach.

## 3. BMMDI - "Boss-Made-Me-Do-It"

This is someone who has absolutely no stake in the business. They are talking with you to fulfill an obligation. If they end up buying, they won't really care if your services deliver or not. They'll never read your reports or give you useful feedback.

This is the third type to scope out early and avoid investing too much time and energy in the sales process. BMMDI's can be found in company's large or small. And if you offer coaching services, beware of prospects who were sent to you by a spouse!

## 4. Opportunists

They are just one step above the takers. They do not part with their money easily. They want the lowest price, the bare bones package, the minimum they can buy. And then they expect first-class service when they pay economy fares.

An opportunist may buy some services, but they will be high maintenance and take up big chunks of your time. If you decide to work with them, you need a very explicit written agreement with clear boundaries which you stick to unfailingly.

## 5. Don Quixotes

These prospects are dreamers. They imagine themselves as white knight saviors. If you're selling into a company, they are going to have trouble getting buy-in and support. If they are individuals, they will talk and meet forever to "blue sky it" but rarely get down to practical action steps.

Look out for prospects who have grandiose visions way beyond their level of experience and capacity. They want it all but can't get a simple project done on time and on budget. Fun to talk with perhaps, but not a lot of fun as clients.

OK, that's five types of prospects whom you want to avoid. If you connect with these types and recognize them, you'll save huge amounts of time and effort by moving on quickly. An initial meeting by phone and a few well-chosen questions will let you know if they fit into any of the above five types.

Next, Jerry went on to identify three desirable prospect types. When you recognize them, give yourself a green light to spend more time exploring how you might work together. They can all be good clients.

## 6. Terribly Troubled

These are prospects who really need your assistance. They have a problem, predicament or pain and are motivated to get it fixed. They are desperately seek-



ing alternatives and will often make a quick decision.

They may be willing to spend a lot, but are often in a rush to get going; as a result they may not carefully evaluate the options. Work to slow down these prospects a bit. Assure them you can help fix the problem, but also spend some time exploring ideal outcomes that will take more time and care to implement.

## 7. Frustrated Drivers

These prospects are very interested in optimal results and will study alternatives intensively. They will commit quickly and spend what it takes, but will expect visible results sooner rather than later.

When speaking with these prospects, communicate about tangible results and clear courses of action. Offer well-documented case studies and proof that your approaches work. When they engage you, set well-defined benchmarks and measure progress regularly.

## 8. Sincerely Growth-Oriented

You might consider this your ideal kind of client. They are already doing things quite well but want to do things better. They have issues and challenges that are not seen as debilitating, but as areas to improve. They are motivated by excellence and growth.

These clients will engage in long-term work, look carefully at the best alternatives, and commit to achieving ultimate goals. Bring your absolute best to working with these clients, as they will reward you financially, emotionally and intellectually.

If you focus on identifying these final three types of prospects, you will start to find more of them. Put even more attention on attracting Type 8's by being a Type 8 yourself. Like attracts like.

Thanks to Jerry Vieira for letting me use his model (apologies for any distortions). I found the types in this model to be very true to my experience and a very useful guide to more effective marketing. Jerry can be found on the web at <http://www.qmpassociates.com>

The More Clients Bottom Line: Much wheel-spinning can be avoided in the marketing and prospecting process if you are aware of the warning signs of

prospects who will squander your time and energy. Put your attention and focus on better prospects who are motivated to take real advantage of your expertise.



*Robert Middleton is principle of Action Plan Marketing. Please visit Robert's web site at [www.actionplan.com](http://www.actionplan.com) for additional marketing articles and resources on marketing for professional service businesses.*

## Elements That Influence a Translation

by Oleg Kuzin

People who know only one language sometimes imagine the process of translation as merely a lining up of the equivalent words in the target language. The following is an example of a typical English marketing statement:

“We strive to utilize best practices in all our client



interventions, and delivery to you unbeatable results.”

The result when machine translated into French:

“Nous tâchons d'utiliser les pratiques dans toutes nos interventions de client, et la livraison à vous des résultats imbattables.”

Translated back into English:

“We try'd to use the practices in all our interventions of customer, and the delivery with you of the unbeatable results.”

It's not as simple as it seems.

### Language groups

It is interesting to note that Microsoft Word, in its Language setting for the Spellchecker, lists 17 kinds of English and 15 kinds of French. Thus, we have a different spellchecker for English from Australia, Canada, Hong Kong, Ireland and the USA. For the French language, Word lists, among others, Belgium, Canada, France, Congo, and Luxembourg. The translator will have to be told which language group is being targeted, their general education level, and the purpose of the communication.

### Same word, two meanings

Even within a national language group, the meaning of certain words might differ depending on the locale. Thus, what the Canadian calls the “trunk” of a car is called the “boot” in England. And what we call the “hood” is called the “bonnet” in England.

Recent evolutions of words can present a challenge to a translator. The word gay no longer has the meaning that Shakespeare gave it. In the same way,

the word “gosses” while referring to small children in France (English = kids), means testicles in Québec.

### Clichés

Clichés have always been a challenge to translate since each language has its own way of expressing an idea. Thus, the expression “Do not count your chickens before they are hatched”, comes out in French as “Il ne faut pas vendre la peau de l'ours avant de l'avoir tué” i.e. do not sell the skin of a bear before killing it. If the cliché is used in a figurative way, you can imagine the acrobatics that the translator has to go through to switch from chickens to bears!

### Convention

Convention is something that also affects translation. Thus in Canada, road travel is measured in kilometres (miles in the US). However, the measurements of a car are expressed in metres and centimetres (4.50 m) and NOT in millimetres (450 mm). Dimensions of screws and nails are given in centimetres or millimetres, not in metres. It is a bit like expressing an adult's weight in ounces. It is possible but not credible.

### Wrong mist

The naming of products in English may also be fraught with trouble if the same words have a different meaning in another language. Thus, the manufacturer of the Mist Stick curling iron of the 60s was



in for a surprise when his curling iron did not sell very well in Germany. He had failed to realize that the word Mist meant dung or manure in German.



*Oleg's professional life as a translator spans over 40 years, in countries such as France, the USA and Canada. Over this period, he exercised his talents among others, for Thomas J. Lipton, Canadian Tire and General Motors, from where he retired in 2001*

[www.translationbeyondwords.blogspot.com](http://www.translationbeyondwords.blogspot.com).

## Don't Sell Anything!

by Cheryl Rankin

**A**re you a business owner trying to earn revenue by selling your products and services? If yes then stop! Honestly, please stop selling your products and services and watch your business grow even faster than it was before.

Instead of selling to your clients, try helping them buy your products and services.

No one wants to be sold anything. How often have you started to enter a store in the mall and watched

### Marketing Tip

You demonstrate your brand by how you treat people face-to-face.

When you're meeting with someone, or in a social/business setting, *don't take cell phone calls, text messages or check your e-mail*, unless you've warned your party before hand that an "important" call might come through.

You may not think it's rude, however what does it say to your friend/colleague/client? It says that text messages, e-mail or phone calls are more interesting and important than they are.

What a snub.

*Courtesy Capstone Communications Group*

as a salesperson runs across the room to greet you? Usually your reaction will be "just looking". The truth is that you were doing more than just looking when you started into the store. You were just looking for a gift for your mom – you were just looking for a new white blouse.

Find out what your clients needs are and then match the needs to your products and services. "Why have you come in today?" If you can not get your client to talk to you about their needs then give them ideas of why they might need you. "Are you looking for an outfit for the holidays or a gift?"

The biggest thing that will help you in this sales process is knowing what you really sell. Do you save someone time, save them money, add professionalism, decrease stress, increase health? This list of benefits that you sell (help your clients buy) is specific to your business.

Clients will usually talk about needing the specific product or service so you will have to interpret what benefit they really need

Talk about the benefit while you are selling the item and afterwards. A prospect who visits a fitness centre and says they want to lose weight, will be more comfortable buying a membership if you tell them how you will help them lose weight. Knowing how many machines are in the building does not help them lose the weight. Once they join then reinforce the message again – we will help you lose the weight that you talked about.

Just to confirm – find out what your client needs, give a possible solution, explain how your solution will solve their need / problem and describe the benefits of choosing your solution. Help your client buy your products or services.



*Cheryl presents at national and international conferences on sales and marketing. She's doubled the profit of a fitness centre in Boston, and increased the membership of a fitness centre in Ottawa from 200 to 3,000 in five years. Contact her through [www.fitforbusiness.ca](http://www.fitforbusiness.ca)*

# The Four Habits of Highly Referable Consultants

by Promod Sharma

**A**s consultants, we rely heavily on referrals. We have different techniques to invite satisfied clients to refer us. They may still be reluctant to pass on our names because their reputation suffers if we fail to deliver. We establish our record over time, action by action.

To get referrals, you need to be referable. Are you? Highly referable consultants follow four simple habits:

1. Show up on time
2. Do what you say
3. Finish what you start
4. Say "please" and "thank you"

This list comes from *How The Best Get Better* by Dan Sullivan. It's memorable but seems too simplistic at first. Let's delve into each habit.

## Habit 1: Show Up On Time

Showing up on time can be a challenge in a grid-locked city like Toronto. You can easily arrive too early or too late. Naturally, earlier is better. Your smartphone lets you use the extra time productively. Or you can relax. Or review your meeting agenda.

Scheduling appointments during off-peak hours makes your arrival times more predictable. Meetings close to home may be better for your mornings or afternoons. GPS navigation helps, especially if you're detoured or make a wrong turn. If you have equipment, arrange to show up early to get setup. Your host will appreciate knowing how much they matter to you.

## Habit 2: Do What You Say

We sell the intangible: our services. Keeping our promises --- however small --- builds trust. Without consistency, trust vanishes. Once we excel at keeping small promises, our bigger promises will be believed. We'll have an edge over our competitors.

I was ready to go to the airport for an early morning flight but the limousine didn't show up. The com-

pany claimed they had no record of my booking and wouldn't send another car. Luckily, I had enough time to drive to the airport, park and rush through security to my plane. Next time, I switched limousine services and now request a wake-up call to get an earlier warning of no-shows.

With our busy lives, it's easy to forget what we say. That's where a pen and paper help. Just write your commitments down --- even the little ones. You'll take pressure off your mind and get better results. Your clients will see you're more than talk. You can even use a voice transcription tool like Dial2Do or reQall on your smartphone: what you say gets converted to text accurately and sent back to you. It's like having a secretary but cheaper.

## Habit 3: Finish What You Start

Saying is easier than doing but what matters is what you deliver. Planning is boring but helps you identify pitfalls before you commit. Planning reduces the number of commitments you accept, which helps you deliver.

Here's another way to look at this habit: don't start what you won't finish. When you fail to deliver, how can a client rely on you next time? They may agree to an extension but will they forget your broken promise?

What if a client demands instant results? If you set aside prior commitments, you're cheating your other clients. You're also telling the first client to pester you again. As a consultant, you're paid to think. With severe time pressure, you're more likely to make mistakes or discover that your estimate should have been 200 minutes instead of 20. That doesn't help when you only have 30 minutes available. Pausing to plan helps keep you out of time traps.

## Habit 4: Say "Please" and "Thank You"

Courtesy stays in style. Consultants are generally good with this ... until the sale is made. According to LIMRA and other researchers, clients aren't thanked enough through ongoing post-sale monitoring. Nowadays, you can easily stay in contact with clients with a monthly eNewsletters. If they connect to you on LinkedIn or Facebook or Twitter, posting meaningful messages will remind them of you.

Your clients won't read everything from you. That's fine. You're still having an impact. How often do you buy a computer? Dell sends me several emails a week plus monthly flyers. When it's time for a new machine, guess what my first choice is? When someone is looking for a computer, guess which brand is top of mind?

Do you want clients, partners or suppliers who show up late, lie, quit or behave rudely? Once you make the four habits part of your life, you'll become less tolerant towards others with lower standards. That's fine. We're judged by the company we keep.

Years ago, I was working on a project for the chief actuary at Metropolitan Life. I discovered that he'd be on holidays on the due date. I asked my boss if we could get an extension. He refused. He explained that missing the date would be a bad reflection on both of us. I met the deadline just because I said I would. That 's a great feeling.

Habits take time to establish. Your clients take time to notice. These four habits seem too simple to matter but following them makes you a better person which gets you more referrals and more business.



*Promod is an actuary with the passion for simple. Promod ("pro-MODE") helps the wealthy tame their financial risks using science and crayons.*

*To help you market better, he freely shares insights here, by blogging (marketingactuary.com) and via an eNewsletter (marketingreflections.com).*



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## Moment: Time to Lead or Time to Follow

by Darla Campbell

The challenge of our times is not to do more with less; it's inspiring leaders to move impossible to possible.

Business leaders make choices everyday. These decisions impact the organization's effectiveness in the moment and in the future. Leaders who choose to lead make a more significant contribution in their workplace, their industry and their community. Their teams are more productive, more effective and contribute more to the bottom line.

Leadership begins the moment we decide to take charge. Whether to lead on a specific project or a task at hand, in a company promotion or standing on a street corner in a crowd of strangers, we have opportunities everyday to choose to lead or to follow. When these choices are made consciously and with volition, the results are more effective and have a much greater impact.

### The Five Steps of Leadership

Leaders who choose to lead have an advantage over those who just happen to fall into the role. Leadership begins the moment the leader decides to take charge. These are the five steps of leadership:

1. Take Charge
2. Evaluate
3. Communicate
4. Use Knowledge
5. Get Feedback

### Take Charge

The first step in leadership is deciding to take charge and letting others know that you are taking the leadership role. According to a first aid course offered by St. John's Ambulance, the first step in emergency scene management is to shout "Help! Help!" This indicates when the casual bystander has made the decision to become a leader in providing first aid. Although leaders in business are unlikely to shout these words to show they are taking the leadership reins, the emergency scenario creates memo-

rable symbolism. What can you do to indicate that you are taking charge? Even if you aren't shouting the word "help!" remember that leaders can't lead on their own.

### Evaluate

It is important to evaluate the surroundings for possible hazards and to identify potential resources. This includes testing, evaluating and consulting with others. The leader needs information to make an informed decision about the most appropriate path to follow. Evaluating options can take mere moments to many weeks, depending on the project. This step is done most efficiently with the support of the team gathering information and presenting options.

### Communicate

Effective communication is critical for successful leadership. The leader's job is to articulate a compelling vision which engages the team in making the vision reality. The leader sets clear goals and openly shares this information. Technology today makes communication even easier than ever before. Choose your words wisely to convey the right message.

### Use Knowledge

Inspiring leaders hone their leadership skills by continuing to learn and applying knowledge on how to be a more effective leader. For a specific project, the leader relies on the knowledge residing within the team and trusts the team to deliver. The leader is

best suited to rising above the details and ensuring that the team has the resources to deliver the solution and achieve the vision.

### Get Feedback

Savvy business leaders get feedback on how things are going as the project moves forward. The value of feedback is significant; it can save millions of dollars by preventing things from going off the rails. There are no failures — only feedback. A leader who accepts all feedback as valuable information moves the project and team forward at an accelerated rate.

Those who lead with volition are leaders who achieve amazing results. Everyone has the potential to be a great leader. Being prepared to lead when the opportunity arises is the momentum that gives rise to our own moment of leadership. Time to lead or time to follow; it's your choice.



*Darla runs amonavi consulting group inc., She's passionate about inspiring leaders to move impossible to possible. A certified practitioner of Neuro-Linguist Programming (NLP), Timeline Therapy and Hypnotherapy as well as an NLP Coach, she can be reached at*

[www.amonavi.com](http://www.amonavi.com).

## Time to Lead or Time to Follow?



### It's Your Choice.

The challenge of our times isn't doing more with less, it's inspiring leaders to move impossible to possible.

At amonavi consulting we inspire you to achieve your vision through leadership, communication and customer service.

**Darla Campbell**  
speaker, coach, trainer,  
collaborative leader

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**amonavi**

*inspiring leaders to move impossible to possible.*

## What Does AIC Mean for You

*by Keith Thirgood*

Founded in 1989, the Association of Independent Consultants (AIC) is a federally registered, not-for-profit organization dedicated to the growth and professional improvement of independent consultants across Canada.

To that end, AIC delivers a number of benefits to Canadian consultants, international consultants with an interest in the Canadian market and organizations who want to reach Canadian consultants. Among the benefits are the following:

- AIC hosts eleven educational/networking meetings a year, the last Monday of every month except December.
- AIC Full Members (2010) get into these meeting for free.
- All AIC meetings are open to the public for a nominal fee. (\$35)
- Members can subscribe to *Marketing Tip of the Month*, an e-zine for consultants and entrepreneurs.
- AIC has arranged with various suppliers for special deals on group insurance, long distance, Internet and other services.
- AIC Members are required to practice in accordance to AIC's Code of Ethics.
- AIC Members get their profiles listed on AIC website, visited by over 2000 unique visitors a month.
- AIC Full Members (2010) get free admittance into one AIC special event per year. \$250 for non-members and \$200 for Remote Members. (See notice on page 7)
- AIC Full Members (2010) get 50% discount on other AIC special events.

AIC members run all kinds of consulting practices – from accounting to web design. Businesses and the media, looking for experts can search the AIC, online consultants database at [www.aiconsult.ca](http://www.aiconsult.ca).

Membership is \$199 per year for Full Membership. Remote members pay \$55. Remote Members get all the privileges of Full Members, however they do not get free admittance to monthly meetings, free entry to the one special event, nor discounted entry for other AIC events.

For more information, contact us at 416-410-8163, [info1@aiconsult.ca](mailto:info1@aiconsult.ca) or by visiting [www.aiconsult.ca](http://www.aiconsult.ca)



*Keith is Past President of AIC and Creative Director of Capstone Communications Group, a marketing firm with years of experience in branding small businesses. He works out of Markham, Ontario He can be reached at (905) 472-2330, or at [www.capstonecomm.com](http://www.capstonecomm.com).*

## AIC Meetings

**February 22, 2010**

### **Making Headlines - How To Get Into The Media For FREE**

*Presented By: Jennifer Beale, Publicist*

Want to get FREE promotion in Print, TV, and Radio but are uncertain how to begin? Or trying to get media coverage but frustrated because for some reason you're not getting interviews?

In this session, you'll learn:

- A proven paint-by-number approach created specifically for consultants and coaches;
- Three (3) things that drive editors and producers crazy (and how to avoid making mistakes);
- How to leverage what you already do to get ongoing media coverage and generate QUALITY business leads.

**March 29, 2010**

### **Ditch Your Pitch: How To Create A Powerful Positioning Statement That Actually Gets People Interested!**

*Presented By: Michel Neray, Founder & Chief Differentiation Officer, The Essential Message®*

Any textbook will tell you what a positioning statement is and why you need it. In this Essential Message Workshop, Michel will show you how to create the most compelling Positioning Statement for you!

You'll learn:

- The 5 core elements that every positioning statement should have.
- The mistake that almost all businesses make when using their positioning statement in their marketing materials.
- How to turn your positioning statement into a compelling conversation starter.
- And more!

**Crowne Plaza Airport, 33 Carlson Court**

7pm until 9:30 pm

Visit [www.aiconsult.ca](http://www.aiconsult.ca) for online registration and details.