



Alan Bradshaw's

**Business Development Toolkit
for Professionals**

**A Guide to Business Development Tools and Processes for
Professionals who want Sustainable Business Growth**

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and information about forthcoming events, please visit my download page:
<http://www.the-stress-site.net/business-development-toolkit.html>*

Why do Professionals struggle with business development?

Because of their knowledge about what makes the rest of us tick, you'd think Professionals (such as Psychologists, HR Consultants and Occupational Health Practitioners) would be great at marketing and business development. Some are, but generally I've found the opposite to be the case.

I think a reason many of us struggle so badly with business development is that we're too busy *doing our thing*. We don't *invest* the time, thought, effort and money needed (but mostly time) in marketing. More than that though, we often lack the relevant knowledge, skills and tools. We might be seen as *experts* in our chosen field, but that can lead to complacency about what it really takes to grow a business.

When I started out in business in the mid 90s (in my case, as a Business Psychologist in the stress management niche), I was the same; ignorant of the ways of doing business and particularly about *generating* business. It took me and my partners three years just to work out *what* we were selling and *why* (which turned out to be training), let alone *who* we were selling it to and *how* to sell it. Gradually it dawned on us (motivated by poverty!) what we needed to do. What we learned about was the power and potency of direct marketing, especially by email.

As we started to do a bit better, we invested in the development of targeted email databases and used those databases and associated marketing such as seminars to grow our business around the UK. That was back in the early 2000s – email marketing was still new and unbelievably effective. People were open to it, less suspicious, and there was a lot less inbox competition for our prospects' attention.

It's harder now to grow your business using *just one* direct marketing tool like email (email is best used in combination with other marketing tools). In recent years, I have expanded my toolkit considerably and have learned much more about the business development processes that really work.

When I started to speak to groups of fellow Professionals about business development, I was taken aback by the response. Never before had I had such an engaged and enthusiastic audience! It was abundantly clear that there's a huge appetite and need for such material, which is based on real-world experience and not marketing theory. The Professionals I presented to told me that no one had ever spoken to them before about these tools and processes. That response is what led me to write this toolkit.

I hope that what you learn here will help you achieve sustainable growth and profitability and well-deserved business success!

Does this reflect your business development wish list?

- You want to *grow* your business. And you want that growth to be continuous and *sustainable*.
- You're looking for practical 'how to' advice on marketing strategies, and specifically on *what to do in what order* in order to ensure that you'll find a continuous stream of *qualified prospects* and turn a good proportion of those into *paying clients*. (This, of course, is the acid test in any business!)
- You also want to know about the *best business development tools*, tools that will save you an enormous amount of time and money.
- You're looking for a *substantial return-on-investment* from your marketing efforts. You want profitability and sustainable growth, but *you don't want to spend a fortune on marketing* in the process.

If it does, great, because that's exactly what you'll find here.

What's in the Business Development Toolkit?

The toolkit has two main sections:

- The first, beginning on page 4, contains general business development and marketing tips from my 16 years' developing businesses in the stress management and workplace wellbeing field. I'm a great believer in learning by doing. However, this guide might help you avoid some of the mistakes I've made, saving you money and time.
- The second and most important section begins on page 9. It describes a business development process I've developed called **MEETS**. Following it enables a large and continuous stream of qualified leads. Central to this process is the organisation and marketing of events. That's what makes lead generation, and hence growth, sustainable.

Naturally, as this guide is called a *toolkit*, you'll find links to recommended tools sprinkled throughout the text so can you see and understand the tools I use in context. Most of these tools and resources are free to use. Some have options to upgrade to paid versions, but even then they are highly cost-effective. You'll find a one-page summary of my favourite business development tools towards the back of this guide (page 25).

Some General Business Development Lessons and Tips

What you don't need

Being from Scotland, you won't be surprised to hear me say that prudence and frugality are virtues in business. The more money you save, the more you can invest in growing your business. Also, financial worries induce chronic stress that you don't need while you are trying to grow your business.

So here is a list of things you quite possibly *don't need*:

- **Premises.** Obviously it depends on the kind of service you offer, but often you don't need office space or a fancy address. When I formed my first stress management company with three partners, we thought, or rather kidded ourselves, we needed a smart Edinburgh West End address and took out an extended lease for a large office space with a training room and several smaller rooms.

It was an expensive mistake and nearly killed the business before it really began. We tried renting the extra space to therapists and used the training room a few times. But we learned very quickly that you just don't need that kind of space. Large organisations have their own facilities and want you to go *to them*, and if you want to run a public event, there are any number of competitively priced options. This is also true of meeting rooms.

You're in a great position to exploit this competitive and flexible market. Many organisations have excellent rooms that they will hire by the hour, and not just hotels. Public and voluntary sector organisations are worth checking out as are membership organisations, universities and colleges. Some of the best value facilities can be found in Further Education Colleges. Often they have brand new buildings with state-of-the-art facilities built in. They're also friendly and accommodating.

The truth is you can usually do everything you need to from a home office, spare room or kitchen table. Clients are interested in the quality of service you provide, not where you run your business from. These days, with a laptop and internet connection you can even run a business on the move (although I recommend using travel time to think about business strategy).

- **Employees.** You can outsource pretty much everything you don't want to do yourself and build a substantial business in the process. What's more, outsourcing is very efficient as you only buy services you need when you need them. I don't want to give the impression that it's not good to create jobs. It is and goodness knows we need them. However, the best chance of growing a business that does create real, sustainable

jobs is to give the business the best chance of succeeding. When you're growing your business, only employ people for very good business reasons.

- **The latest communications technology.** I need to be careful what I say here. Of course, you do need to take advantage of communications technology. But I know from painful experience how much money you can waste and how quickly, especially from subscription / contract services. It's oh-so-easy to forget how quickly the costs mount up. Often you can do the same thing for a fraction of the price as pay-as-you-go. Also, you have to ask yourself whether you really need that latest i-phone or i-pad. OK you might *want* them but do you *need* them? All you need in my opinion is a pay-as-you-go mobile and decent laptop/PC. If you want to save money, this is one of the key areas; only buy what you really need.
- **The latest software.** The old versions work perfectly well and besides you can usually find free software that'll do the job just as well. Check out [Open Office](#) a free suite of 'open source' programs that does everything that Microsoft Office does.

In fact, Open Office does business-friendly stuff that Microsoft Office can't do, like convert files to PDF whilst preserving embedded links. That's hugely valuable for the development of ebooks, which are a great marketing tool. And it's free, while Microsoft Office costs a small fortune to buy new. This ebook was written using **Writer**, an Open Office program.

- **A new car.** Cars are unbelievably expensive to run. Keep your old one going. It'll save you a fortune and you won't worry about it as much. You don't need the financial strain that is a new car. If image and creating the right impression are important, you can always use an upmarket taxi or hire car if you need to.

The truth is, to give your business the best chance of success, you need to **keep your overheads to an absolute minimum**. Don't worry about your street-credibility, get on with running and growing your business. To begin with you just won't earn what you did as an employee, and there's no point in pretending otherwise. But ultimately you have the potential to earn far, far more and create real wealth for you and your family. That's a goal genuinely worth pursuing.

Marketing and Sustainability

Growing a profitable business is tougher than it used to be. The business environment is very difficult because of the economic climate and the collapse / implosion of the public sector. The public sector used to hire a lot of

consultants. Ironically, all that turmoil in the public sector has in turn led to many Professionals considering (or being forced to consider due to redundancy) a move into consultancy. It's therefore become much tougher to win business. To succeed you have to be better and smarter than others at marketing if you want to survive, let alone grow your business.

When many people in our type of business start out, there is a *honeymoon period* where they get business from referrals. Usually these come from friends and associates. That's great and it's always good to get a little help from from your friends, but it's not a sustainable business growth strategy. Many professionals who start businesses ultimately give up because the work dries up and they don't know what to do to generate new clients. It's very difficult to grow a business without new clients.

So the most important general lesson is that **you have to do marketing**. You can't spend all your time delivering your service, otherwise you'll never be able to grow your business. Understanding and acting on that simple truth will set you apart from most of your competitors who will rest on their laurels (or carry on relying on their friends!).

The marketing that costs the most is usually the least effective. Have you been lured into parting with large wads of cash by some persuasive telephone salesman who promised you a short cut to that much cherished meeting with the Group HR Director of Corporate Megabucks at some HR 'Summit'? Yep, we've all fallen for that one (hopefully not more than once!) and many other completely useless, sales-driven, marketing short cuts.

They don't work, they never will. The rule is: If they clearly have a large and well-trained sales apparatus, don't give them the time of day. Because that's all it is, a sales operation. Don't get drawn in to the conversation or their very clever questions. Be assertive and PUT THE PHONE DOWN. And if the word 'summit' enters from stage left, depart at speed from stage right. OK?

Compare this with organising your own event, hosted by a large organisation that provides the venue space and refreshments, where you are the main or only speaker, which attracts 100 people you already know are interested in what you have to say. This takes time and effort and perhaps a little skill to make happen, but very little cash outlay and has an incredible return-on-investment. I'll have more to say about this highly effective form of marketing later on. But suffice to say, events like this are a key part of my business development process.

By and large advertising is completely useless unless you are 'growing a brand' and have a lot of money to throw at it. You probably don't and neither do I.

Good marketing is not about spending the most money. There aren't

short cuts. You need to do it, in a smart way. And yes it takes time, and yes it's hard work (sorry, but that's how it is). In fact, having *less* money to spend on marketing can be a genuine advantage, because it forces you to *think*, be innovative, creative and strategic with your marketing.

Don't be a sheep. Mostly, people do the same kinds of marketing that they see others doing – they follow the flock. They go to the same exhibitions and advertise in the same publications in the same way as they always did. And that tends to get about the same results. It's not the way to grow your business. Marketing is about getting noticed, about being different and distinctive.

Be The Big Fish (or 'Big Fat Panda'). This is my number one, general marketing tip for people in our kind of business. You want wherever possible to be a *Big Fish in a Small Pond*. What I do, as you'll soon see, is create multiple opportunities to be not just A Big Fish, but THE Big Fish!

Have you seen the film Kung Fu Panda? The film's unlikely hero is called Po. This quote from the film's climactic fight scene sums up my point perfectly...

Tai Lung: You can't defeat me! You... you're just a big... fat... panda!
[*He throws a weak punch, Po catches his hand by the finger*]

Po: I'm not a big fat panda. I'm THE big fat panda.

For the full Kung Fu Panda experience, check out this [8 second youtube video](#).

The business development process I use, which I'm going to explain to you, is all about giving you *multiple opportunities* to be THE big fat panda. In person. In front of a large audience of people who you already know are *all* interested in your chosen topic or issue. Attention 100%. Competition zero. Which is about as good as it gets in marketing.

Give to get

These days in business, you have to give to get. So something which I strongly recommend you do is to **adopt a giving mentality**. I've seen a lot of Psychologists and other Professionals get too hung up about their intellectual property and in the process miss a lot of opportunities to connect with potential clients.

Will people steal your best ideas? Yes, if they're any good, they will. Can you protect them? Possibly. Is it worth it? Almost never. Why? Because it's a waste of your time and energy and a waste of money. The only people guaranteed to do well out of intellectual property are Lawyers.

(By the way, I do understand issues about knowledge transfer and IP having been involved in the set up of a psychology-based university spin

out company. The process was unbelievably bureaucratic and painfully slow – there was a kind of academic paranoia about not giving away the 'secret formula', which got in the way of attracting potential clients and killed entrepreneurial spirit!)

In fact, the best approach business-wise is usually to do the opposite and **give stuff away**. It's what I'm doing here. Why? Because I know it'll help me market my knowledge and ultimately win me clients. Which brings me to a marketing mistake the vast majority of professionals make. They have a website (good, you need a website!) but it's essentially just an online brochure. Big mistake, because most people think 'so what'. They couldn't care less about your online brochure and they quickly move on.

On the contrary, what people are looking for online is information and resources. So **the best way to use your website is as a site for giving**, as an information resource. If you want your site to be 'sticky', to have people stay on your site for a while and have a good look round, you have to give them what they are looking for. [My website](#) isn't perfect, but it's packed with content, information, and tools that people can download. People generally stay for some time and visit multiple pages. The content-rich nature of the site also encourages people to link to it, which generates traffic.

At this point, I'd like to recommend one of my top business development tools. It's a free tool for developing websites called [Weebly](#). I have developed a number of websites with it and use it every day. What I like about it is that you don't need to have any 'techy' tendencies whatsoever to build your website. For me, it has completely eradicated the need for a web designer or developer, which of course dramatically reduces my costs.

Also, because your website is so critically important to your business, you should have a high degree of control over its development. **Never, ever, let someone else have total control over your domains or website**. I have seen at close hand nightmare scenarios where unscrupulous web developers have essentially held their clients to ransom or, even worse, deliberately sabotaged their efforts to make changes. At the very minimum, you need to make sure you have ownership of your domains and know how your website works, so that you can make changes when you want to. It's an area where an element of 'control freakery' is a genuine virtue.

Now, I'd like to turn to the business development process I use to generate prospects and turn many of those prospects into paying clients. I call it the **MEETS** process.

MEETS: A Proven Business Development Process to Follow

Before I explain the **MEETS Business Development Process**, it's important to emphasise that this is a *process* with a number of overlapping stages. Generally, you have to go through all the stages of the process before you win substantial in-house contracts. In our type of business there can be long lead times from first contact with a prospect to winning the business.

MEETS is a proven process that ensures a constant stream of prospects and multiple opportunities to win clients. I'll expand on each part of the process and let you know about the tools you can use to save you time and money.

But first, here's an overview of the 5 stages of MEETS

- M** stands for the initial **M**arketing phase
- E** stands for **E**vents
- E** stands for follow-up **E**mail marketing
- T** stands for **T**ools and also for **T**raining
- S** stands for **S**ales of your in-house **S**ervices

The 'MEETS' aspect of this is not coincidental. In our kind of business you're not usually selling a product but a *service related to your area of expertise*. Because of this, developing a relationship with your prospective client is vital, and you can't grow meaningful relationships without *meeting* people.

M – The initial Marketing phase

I need to be clear what I mean by marketing. To me, this initial marketing phase is about ***finding and communicating with the people who are interested in your issue or topic***. Notice that I don't say interested in *you* or what you're selling.

This involves three important tasks. You need to identify or find:

1. A hot topic or issue related to your area of expertise that you can speak knowledgeably about and do marketing around
2. The (groups of) people who are most interested in your topic or issue
3. Hubs – the Organisers of relevant groups, networks or communities

Find a HOT topic or issue

A mistake made by many Professionals is that they try to sell too soon. It's a big mistake. What I've found is that you first have to build a following, an interested audience, around a hot topic or issue. Unless you already have a very high profile, no one is going to be interested in *you*, but they will almost certainly be interested in learning about your topic or issue.

So the first thing you do need to do is find a hot topic or issue related to your area of expertise and use *it* as the focus of your marketing efforts. I look for a hot topic or issue where there is both current / recent research about the topic available *and* free tools that people can use.

This requires a bit of research, but you don't need to employ consultants or do anything sophisticated. You just have to find out what's hot in your niche and build from there.

How do you do that? It's easy. Use the search engines, check out what's in the news and what those people you want to do business with are talking about – on blogs, in their trade press or journals, on twitter.

Find the people interested in your topic or issue

Next you need to identify the people or groups with a professional or business interest in your topic or issue. For example, the people I am usually interested in (because they are interested in my stress-related issue or topic) include the following:

1. HR (including organisational and staff development people)
2. Health and Safety Managers and Advisers
3. Occupational Health Professionals
4. Psychologists and Allied Health Professionals
5. Consultants in the fields above

You want to make sure you can find, and especially communicate with, as many of the people you are interested in as possible. But how do you do that? You might already have a decent sized list of contacts, maybe even hundreds of contacts if you're lucky. But marketing is a numbers game and you really want to be able to communicate with thousands in order to grow your business.

Find 'Hubs'

I hunt for what I call **hubs**. Hubs are people who have their own lists or networks of the people you are interested in. Hubs are special people; the *Organisers*, the *Connectors*, the people who create communities, who, often selflessly, run networks and groups.

Who are the hubs in your niche? They could be:

- People who run national, professional membership organisations (or for local hubs, they might be Secretaries / Chairs of local branches). What are the relevant membership organisations in your niche?
- People who run *sector-specific* membership organisations. For example,

the Higher Education sector has many membership organisations related to specific professional roles such as UHR (for HR in universities), USHA (for Health and Safety), UUK (for Vice Chancellors) and so on. If you have a sector that you often do business with, invest the time and effort to get to know the networks and hubs for that sector. In some sectors, notably Local Government, there can be large online learning networks called 'Communities of Practice'. Try using this as a search term in google and see what you find.

- People who work for large public sector organisations that deal with the topic or issue you're marketing around (covering both National Government Departments, Local Government, NHS / Workplace Health Improvement). Some of these people will be specifically tasked with communicating with organisations and individuals. They may therefore have newsletter lists with thousands of people very likely to be interested in your issue.
- People who organise relevant networks for not-for-profit organisations or charities. It's likely there will be such organisations interested in your hot issue or topic and if so, they will have lists of members they communicate with regularly
- People who have set up commercial or business networks, locally or nationally. These may be networks of employers / organisations or networks of individuals.
- Hubs within Trade Unions. Trade Unions are employee membership organisations set up to further the interests of the interests of their members. Some of course could represent professional groups you want to communicate with, so may be highly relevant to your marketing.
- People who organise online communities, networks and forums e.g. **LinkedIn** groups. LinkedIn is an excellent place to search for online professional or business-related communities. It has great search functions. Once you're a member you can search for and join groups likely to be interested in your topic.

(Of course, you could also organise your own networks and create your own online communities! It's very likely that before long others will see you as a hub, which provides significant commercial opportunities).

A great source for this kind of information (in the UK) is something called the A.S.K. Hollis Directory of UK Associations. It appears not to be in print now, but you can still find **used copies on Amazon**.

You could also check out online directories. Unfortunately, google has now removed its own directory function, but there are other online directories

including [dmoz](#) and [yahoo](#) you could try. With directories, organisations are classified by type or function so it can be much quicker to find appropriate organisations and groups.

Sometimes the greatest sources of knowledge about hubs are your existing friends and contacts. Don't be shy, ask people.

No doubt when you reflect on this, you will think of your own hubs. Through them you can communicate with potentially vast numbers of the right people. And don't forget that within every community, there are those people who themselves are the natural organisers, connectors and community builders. You won't know now who they are, but I can tell you from much personal experience that people you have never met will spread your message. This is known as *viral marketing*.

You need to make it a priority to get to know such people, to help them and give them something of value for their networks so that they will communicate what you want to say to their members. Please note that it has to be something that their members will really value. No one is going to communicate your sales pitch, but they might well let people know about your free event or free report if it is relevant to their members.

One final point about the groups of people I listed as interested in my topic or issue. You might have been surprised to see me list psychologists and other consultants. But I never see consultants as competitors, rather as people I can collaborate with and potentially generate business for. They are interested in my topic or issue *and* in my audience. Remember, if you have an interested audience that is *always* a business opportunity!

What we have been discussing so far is about finding as many people as possible who might be interested in your issue or topic – we're spreading the net wide using viral marketing, especially by working with hubs.

But how do you build *your own* opt-in list?

That's when we come to the next stage of the process; **Events**

E – Events that attract the right people

I recommend using **free, hosted events** as the magnet that attracts the right people (or prospects). What I mean by this is that the events are *free* to all participants and they are *hosted* (or *sponsored*) a large organisation. The host provides the venue and the refreshments, which minimises your costs. Sometimes hosts will even pay your expenses or a small fee. You provide the content, the presentation, which is built around the hot topic or issue you have identified.

Why free events? *Free* is incredibly attractive to people, and still one of the most powerful marketing words, especially in the current climate. We all love a bargain and I make sure that's what participants get, a quality, content-rich event, which costs them nothing to attend.

That might sound a bit crazy but it isn't, because it's all about the process. You're using the free event to attract the right people and begin a relationship with them that ultimately results in what you want – business.

Also, *free* opens marketing doors that otherwise would remain tightly shut and locked. Hosts, membership organisations, institutions, even other businesses, will actively promote your event.

Why? Because it's not only free but a quality event that's relevant to the people they want to engage with, such as managers, members, readers, and customers. That makes them look good and everyone is interested in good PR.

Yes, other people and organisations (see the *hubs* discussion on page 10) will do your marketing for you, when they see it as being in their interest (make sure you give them those reasons). I have had single sources/hubs that generated several hundreds of attendees to my events, because they were free and highly relevant to the people who mattered to them.

This again is why you should look to market and base your events around a *hot issue or topic* and not yourself or your business.

Additional, psychologically compelling reasons I market with events:

- Generally, people won't buy a service based on your area of expertise without first having met you at some point *and* seen you in action. Events provide the opportunity for both. Events provide an opportunity for what the American Psychiatrist and Author, Edward (Ned) Hallowell, calls 'human moments', to *connect*, to shake people by the hand and look them in the eye. Social media and online networks might be all the rage, but I can assure you that in the world of selling professional services, personal contact and relationships still matter, perhaps even more so. In fact, fewer Professionals are using events in the mistaken,

misguided belief that all you need to do is use twitter and facebook. Using events will give you a major competitive advantage.

- Events enable you to meet a lot of the right people (so it's *targeted*) at the same time in the same place (so it's *efficient*), who have chosen to be there (so they are *qualified* leads). Not only that, because of the questions you asked when they signed up to your event, you will know why they were *motivated* to attend.
- Events with high numbers of interested attendees provide **social proof** that you are an expert and a credible source of information. Social proof is a powerful weapon of influence. (Check out Social Psychologist, Robert Cialdini's, book: **Influence: Science and Practice** – the best book I've come across about the psychology of influence). Potential hosts are also more likely to offer to host when they see that similar organisations have done the same. Some call this the 'Bob Geldof Effect'. When he was promoting Live Aid, Sir Bob would phone up image-conscious Supergroups and say something like: "They're ****ing doing it, why aren't you?"
- Events raise your profile and credibility, both with prospects and with potential hosts, increasing perceptions of you as an *expert* and an *authority*. The benefits that ensue in terms of a heightened profile are obvious in marketing terms. But your raised credibility is of immediate benefit, because it lowers the perceived risk of doing business with you.
- Providing a high quality information and resources via a free event generates strong feelings of reciprocity towards you, increasing the likelihood participants will become your clients. Of course, reciprocity is another potent form of social influence.
- Attending an event (even going to the trouble of *booking* an event), requires a commitment on the part of the attendee or the organisation sending people. Knowing as any good Psychologist should about the research on commitments, I know that attendees / organisations are then much more likely to act in ways that are consistent with their initial commitment and indeed may make much larger commitments later on.
- There's something magical about a good event. Events create a new community and a real buzz around what you're doing (sometimes called 'word-of-mouth marketing'). You'll find after a while that this starts to rub off on your business in profitable ways. People will phone you and say: "Such-and-such attended your event and said it was brilliant. Could you do something similar for us?"

Eventbrite – event organisation and marketing tool

The free tool I use and recommend for organising and marketing events is called **Eventbrite**. Really it's more correct to call it an event organisation and marketing *platform*. It's the single most important tool in my business development toolkit. It has transformed my business and particularly the way I do marketing. I can't recommend it highly enough.

I use Eventbrite for organising all the free events I run *and* for the high value training events. If you want to see this in action, check out my **Eventbrite page**. Under 'events' take look at the 'current events' and 'past events' tabs and you'll get an insight into how I use this powerful tool.

The important thing is that it's completely free to use for free events (which most of mine are) for what is by far the best available online event tool. You only pay Eventbrite a small booking fee for each paying delegate if you are running commercial events, and even then there's a ceiling on what you pay.

In this short guide, I won't go into all the details of how I use the functionality of **Eventbrite** (most people who do use it barely scratch the surface of what it can do for business development). Likewise, I have a lot more to say about the organisation, planning, structure and marketing of events, and about how these aspects influence business development. There's a lot to impart about these aspects and these are advanced business development strategies more appropriate for a training setting.

Other People's Events

Before we leave subject of events, I need to say something about other people's events. I look for a balance between organising my own events and speaking at events organised by other people.

We've already discussed the value of *hubs*, the people who have their own networks of people you'd like to communicate with. Hubs often organise events for their own groups and members, and that's an excellent marketing opportunity for you. If you have a presentation that will be of interest to the hub's network, approach them and ask if they'd like you to present this to their group. Often they will, and of course they'll market the event to their members so you don't have to.

But how do you build your opt-in list from other people's events?

Here's what I do. I always take slips with me to events, which I make sure every participant has before the presentation starts. This slip is for gathering their contact details. I make it clear at the beginning of the presentation what the slip is for – so I can send them follow-up emails with information, tools and resources. I also remind them at the end, so people will give me the slips

before they leave.

Usually, over 90% of people complete and hand in the slips. They do so because they see the value in getting high-quality follow-up information and that is what I provide. In the process, I have grown my opt-in list substantially.

You need to be flexible and be prepared to travel to maximise the benefits of this approach. Events may be in the evening and quite a long way from home. Some event organisers will pay your expenses, some won't. Some will pay a contribution. So you have to weigh it up whether it's worth doing. But always bear in mind that this is both an opportunity to present to people who have qualified themselves as interested *and* an opportunity to grow your opt-in list, all at relatively low cost.

It's worth thinking about isn't it?

To sum up then, the first two stages of the MEETS process, are all about:

1. **Marketing:** Finding and communicating with the people interested in your chosen hot issue or topic, especially via *hubs*.
2. **Events:** Attracting those people with free, hosted events that provide them with high quality information on that issue or topic. This enables you to grow your own opt-in list.

Making Money (E, T & S)

When, I hear you ask, do we start making some money? That, you'll be delighted to know, comes with the three next stages of the MEETS process, which are:

- E** – Follow-up **E**mail marketing
- T** – **T**ools and **T**rainning
- S** – **S**ales of your **S**ervices

In terms of delivery these occur roughly in chronological order, although you have to think about T and S before you can do E. Let me explain. What you need to think about now, before you do any more marketing is this:

What are you selling?

- You need to have a range of offerings to sell; easier-to-deliver, lower-cost, shorter-term offerings, and higher-priced, longer-term offerings.
- You use the follow-up email marketing to promote what you're offering that solves problems they have related to the issue covered in the event.

The way I look at it is like this. For cash flow, I want and need to have in place shorter-term cash-generating offerings. For me, that's public training events (or train-the-trainers) that are directly linked to the issue or topic I talked about in the free events.

By the way, **don't do any kind of hard sell at the free events**. My advice is to *never* make any event like this a sales pitch – people feel manipulated and it turns them off. Instead of selling, give them all the information and resources they need to convince *themselves* that they need to do something about the issue.

My longer-term goal is to sell my (or others') in-house services, which are more varied and not necessarily so directly related to the issue or topic covered in the event. I know from experience that the lead time for generating in-house work in my niche is usually 6 to 18 months.

Because they now know me and know I provide them with the quality information and resources they need, the people who come to the events are by far the most likely to attend the public training events and/or purchase in-house services.

Marketing is to a large extent a numbers game. The more people who attend the events, the more people will book for the public training courses and become in-house clients. Without the events, my chances of acquiring more than a few clients in the current climate would be near zero. Which brings us to the third stage, email marketing...

E – Email Marketing

This is the second **E** of the **MEETS** process and here I am talking about *follow-up* email marketing to your opt-in list. These are the follow-up emails you send to all the people who attended, or showed interest in, your Event (the first E). If you've used [Eventbrite](#) for people to book onto your events, I recommend you use a powerful email marketing tool called [Mailchimp](#). The main advantage Mailchimp has over other, similar tools is that you can totally integrate Eventbrite and Mailchimp.

Another excellent tool for email marketing is called [AWeber](#). The lack of integration with Eventbrite is the only real drawback with AWeber. It means a bit more work importing / exporting data, and you have to also go through an additional opt-in as AWeber treats your imported data as a completely new list, which is a bit annoying when people have already opted in to your event.

I recommend you send these follow-up emails in a sequence of 4 (this is called an *autoresponder*) and each email has a different *main focus*:

- The first email's main focus should be on *free tools and resources*. These will be tools and resources directly related to the issue or topic you discussed during your event. Always give people highly relevant stuff that they will value. If you can, place the tools and resources on your website and provide links in the email, so people can simply click through to access and download the tools. I say more about where you can find relevant tools and resources on the following pages.
- The second should mainly focus on *your shorter-term cash offering* such as *Training*. This could be a public training event, such as a train-the-trainer, where participants learn how they can use the tools and resources in their own organisation, or as a Consultant. If you set the event up on Eventbrite, you can simply link to it from the email. Use this email for giving people all the relevant information they need about the training.
- The third should mainly focus on *your longer-term offerings* such as your in-house services. This is about raising awareness about what you can deliver and it's about prompting enquiries by email. You can use the email to introduce what you do and how that helps clients solve problems. You can also link back to your website where there is more detailed information. You can't really *sell* in-house services by email but what you can do is stimulate enquiries that lead to conversations and invitations to meetings where you *can* sell your services.
- The fourth should provide links to *more free tools and resources*. These might be indirectly related to your topic of issue, but nonetheless highly valuable resources that people can download from your website.

This sequence is not set in stone either in terms of the order or the focus of the emails. But it's what I've found to be effective. Also, when I say *main* focus above, I mean that the email should *mainly* be focussed on that area. So for example, if you have a public training event to sell, you should include a link and some copy about that in *all* your emails. However, the second email should be *mainly* about this training.

Writing influential email copy is an important business development skill that can be taught. I cover this in depth and provide email templates in my training courses.

Now though I need to explain more about the **T** and the **S** parts of **MEETS**, so you can see how it all fits together.

T – Tools and Training

Here, we're going to look at the **T** part of the MEETS process. The **T** actually stands for two things, Tools and Training. You'll be promoting both within your email marketing campaign. We'll look at Tools first.

Tools (and Resources)

There are fantastic free resources and tools out there that you can use to help with your business development. You can find them if you do a bit of digging (e.g. google search, research and trade journals, membership organisations, media websites, relevant public sector websites and so on). I'm sure that will also be true of the topic or issue you want to market around. You might even have developed your own tools.

For example, here in the UK (and Europe), there has been substantial public sector investment in the fields of stress management and workplace wellbeing (my niche). We're also fortunate to have Psychologists and other Professionals carrying out world class research. This research has often been funded by the public sector and other stakeholder organisations resulting in the development of excellent free tools and resources.

A great example is the outputs of the [**Affinity Health at Work Research Consortium**](#). This is a research group led by Occupational Psychologists that has been responsible for much publicly funded research and the development of tools related to issues such as stress management, engagement, resilience and absence management. Because this research is publicly funded, the tools and resources are usually free to access and use.

Once you have found relevant, free tools and resources (i.e. relevant to your topic or issue), you need to keep a note of the links where people can access them or, even better, place the resources on your website where people can download them (you may need to check you can share this information). Either way, you can now provide relevant links in your email marketing as discussed earlier.

How does this help with your business development? Well, what you are doing is positioning yourself as the information source, the conduit, THE key person (or organisation) that shows people how and where they can access these excellent free tools or resources. That of course brings large numbers of people to your website, increasing the likelihood they will look at what else you can do to help them.

And that doesn't just apply to your own services. If you can position yourself as the friendly, expert source, you're in the pre-eminent position to promote or

sell *any* service linked to your chosen issue or topic.

Please note, if you really want to grow a *business*, those services increasingly won't be provided by you. That's what will define you as an entrepreneur rather than just another Consultant.

So your mission, should you choose to accept it, is to take the time to search, to dig a little and to find those great tools and resources. When you do your follow up email marketing with [Mailchimp](#), your first job is to facilitate access to these tools, preferably hosted on your website.

Training

The second **T** is training related to your issue or topic. Well for me it is but for you it might be something different. Whatever it is, it needs to be a **shorter-term cash generator** that you can promote via your email marketing.

Because the lead time for selling in-house services is so much longer (typically 6 to 18 months), you need to promote something that generates cash-flow quickly. Any business needs cash-flow in order to survive and grow.

A very wise Accountant once said:

- Turnover is *Vanity*
- Profit is *Sanity*
- Cash-Flow is **Reality!**

I follow up free events with (paid-for) training for good reasons. Perhaps the most important is that people understand the value of training, especially if it is highly relevant to their needs (or their organisation's). Although I provide high quality content at the free event, the free event is shorter and for a much larger group – it's really for raising awareness about the issue and the tools. I like therefore to follow up with high-value, high-quality training or train-the-trainer, which is for smaller groups, in a workshop format over a full day.

This to my mind is the perfect follow-up, but of course in your niche, you may have different but equally valuable follow-up services that people or organisations value and are willing to buy.

There are two rules I go by. The shorter-term cash-generator must:

1. Have high perceived value and credibility, and;
2. Be a simple uncomplicated offering.

Complexity is risky and it kills sales. A problem with many of the in-house services that Professionals sell is that they are often multifaceted, complex offerings. Those can be sold, yes, but in my experience this takes much more time.

Think about this way. Naturally, you want to sell your fantastic in-house services, which have all sorts of wonderful benefits for your client. But these are very tough times economically. So first you've got to demonstrate you're credible and can deliver at the lowest possible risk to the potential client. That's what this process does. It lowers the risk to the client, they get to try out or *pilot* what you can do. This gives you the best possible chance to sell your all-singing-all-dancing, in-house services later on.

Affiliate and Referral Programs

There is another business angle we haven't yet covered, something you can potentially promote using follow-up email marketing to your opt-in list, which is an alternative, or additional, shorter-term cash-generator.

I'm talking about recommending and making money from sales (or subscriptions) of others people's tools, services or information – **Affiliate Programs**.

These days, you can promote pretty much anything as an affiliate. Anyone and everyone has an affiliate program, including ones you're probably aware of like Amazon and ones you maybe aren't like Tesco. Yes, even Tesco has an affiliate program!

If you're an expert in your field, it's likely that you'll be used to providing high quality information. There are relevant information products and tools you can promote covering every niche (one great place to research these is called **Clickbank**) and you could, of course develop your own information product and have other people (*your* affiliates) promote it.

The point is that if you follow the process I've outlined here, you'll grow a highly qualified audience in your niche. You'll demonstrate that you're a credible source, so your audience or list will naturally be very interested in what you advise and recommend. You're therefore in a very strong position to use affiliate / referral programs as an income source.

A source of information about affiliate programs and internet marketing that I use myself is called **Affilorama**. Affilorama has an extensive range of articles, videos and training worth looking at if you're interested in making money from affiliate marketing. You can join this for free, but there are also paid and premium versions.

My advice is to try the free service and have a good look around. A great starting point is Affilorama's introduction page (click on 'introduction' in the navigation bar under the title banner near the top of the page). This will give you access to a series of videos that explain all about how affiliate programs

work. If you think they could work well for you, it's well worth checking out the Affilorama's paid and premium services.

Here's some general advice if you're considering affiliate programs:

- Firstly, don't be in too much of a hurry to sell stuff. Adopt a giving mentality as I said earlier. And what I have found is that you have to get an interested audience around an issue *first*, before you can sell anything.
- Secondly, it's always best to recommend the tools and resources you use yourself. That way you know what you're recommending is good and of real value to your audience.
- Thirdly, what you're recommending needs to be *relevant* to your audience and their needs, especially if you're marketing around a particular issue or topic.
- Finally, don't think or assume that you need to do the *selling* of the tool, information or product you're recommending. Any good affiliate program will have a comprehensive range of effective sales tools and copy expressly designed to do an effective sales job. All you have to do is 'pre-sell', for example, explain a little about how you use the tool and give some contextual information along with a link. It's not *your* job to do the selling, it's *theirs*.

S – Sales of your Services

As Professionals, our ultimate goal is to sell our services to in-house clients. Usually, when we start out, that's sales of our *own* service, although if you really want to grow your business, you'll probably need to get into selling other people's services too.

But this toolkit is not about how to sell. I'm sure that will be a great relief to many Psychologists and other Professionals who come out in a cold sweat at the thought of selling. Certainly there are skills that will help you sell if you need to do that and I discuss these in my training sessions. But for now, you'll be pleased to know we'll be leaving selling to the many excellent sales people out there.

The key point I want to get across is this: **As a Professional, if sales of your services do happen, it's at the end of a process.** It's not an impulse buy.

In this toolkit, I have explained a powerful business development process to enable sales, called **MEETS**, which involves:

- M** - Marketing Communicating with the people and organisations interested in your chosen hot issue or topic, often via *hubs* (see pages 10-11 for an explanation of hubs)
- E** - Events Running free, hosted **E**vents around this issue or topic
- E** - Email marketing Sending a series of follow-up marketing **E**mails to your opt-in list or audience
- T** – Tools / Training Providing access to free **T**ools and promoting a shorter-term cash-generator (in my case public **T**rainning courses)
- S** - Sales of Services This leads ultimately to **S**ales of your in-house **S**ervices

What makes the MEETS process so powerful is that it provides multiple opportunities to build *relationships* with people and organisations who have already demonstrated that they are interested in your topic or issue. By following the process, integral to which is the running of events, you naturally build your credibility as THE friendly, expert source. This grows and cultivates these important relationships, and that in turn leads to people *coming to you* when they have a need for the kind of service you provide.

You'll be the first person (or organisation) they think of, email or call when they have a problem that you / your organisation can solve.

Sales are therefore **a natural consequence** of following the MEETS process. You don't really need to do any kind of hard sell, which puts people off anyway.

The MEETS business development process is not a marketing 'quick fix'. It is however the most effective business development process I know for achieving continuous and sustainable growth.

A Summary of My Favourite Business Development Tools

Below is a summary list of my favourite tools. I've include page numbers for where they appear in context within the toolkit. Most of the tools are free to use. Some have options to upgrade to paid versions, but even then they are highly cost-effective.

Eventbrite: This is an online platform for the organisation and marketing of events. Free for free events, you only pay a small fee if you sell tickets. I use Eventbrite both for organising free events and for high value training events, which I charge for. Events are integral to the business development process I use and recommend. There are plenty of online tools around for organising events. In my opinion, this is is by far the best. (See page 15)

Mailchimp: An excellent free tool for opt-in email marketing or newsletters. It integrates seamlessly with Eventbrite, so you'll find it incredibly easy to move between event organisation and email marketing. One of the most important functions you'll want to use is *autoresponders*. This is where you send a scheduled sequence of follow-up emails to an opt-in list. (See page 18). Another great tool with similar functionality is called **Aweber** (it's a shame it doesn't have the Eventbrite integration though).

Weebly: In my opinion, the best website development tool and definitely the easiest to use, using an incredibly simple drag-and-drop interface. Free to use, and cheap, even if you upgrade. I use this for all my websites. (See page 8)

Open Office: A free, open source alternative to Microsoft Office (word processing, spreadsheets, database etc.). Has some business-friendly functionality that Office doesn't have, such as one click conversion to PDF and preservation of hyperlinks. That might sound a bit geeky but it actually saves a lot of hassle and is very good for business e.g. ebooks. (See page 5)

Affilorama: Affilorama has free and paid / premium versions. It's a great information and training resource for everything related to affiliate programs and other aspects of web marketing. Affiliate programs are basically for when you want to promote or recommend other people's stuff. Examples could include include software, information products and books. (See page 22)

Dropbox: This is not a business development tool as such (so is the only tool I haven't mentioned inside the toolkit), but a life and time-saver while you're busy running your business. Dropbox is free web based service where you can keep and access all your files from any computer, anywhere (as long as you have an internet connection). Looks like and acts like *My Documents* but is hosted remotely, so you never have to worry about losing your files again. If you've ever had your computer crash, or laptop stolen (I've had both happen to me!), you'll see the value straight away. A simple but brilliant little tool.

Thanks for Reading my Business Development Toolkit!

Well, that brings me to the end of this Business Development Toolkit for Professionals. I hope you have found it useful and most of all I hope it helps you grow your business profitably and sustainably.

I'd love to get your feedback and comments. My contact details are:

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What next? Can I help you with:

- **A presentation to your group?** If you have a group or network with members who you think would benefit from a free presentation on the ideas, processes and tools I've discussed here, I'd love to hear from you.
- **Master-class training?** I'm currently organising some master-class training courses in the UK that will cover the tools and strategies I have discussed in this toolkit in greater depth. (If you sign up using the link below, I'll keep you updated about training opportunities).
- **In-house training or coaching?** I can also provide you / your organisation with in-house training, coaching and consultancy. Please contact me to discuss your requirements.

Good luck with growing your business!

Alan

PS. If you've found my toolkit useful and know others who might benefit, please pass on my sign-up page link. That way people can download this guide but also receive updates, get regular business development tips and receive information about forthcoming training events.

My sign-up page link is:

<http://www.the-stress-site.net/business-development-toolkit.html>