

SALES AND SERVICE

# Excellence

THE MAGAZINE OF TEAM LEADERSHIP

MARCH 2013



**Don Peppers  
and Martha Rogers  
Consultants**

**Dark Side  
of Teams**

**Get More Done**

**Avoid Oversights**

**Cement Customer Loyalty**

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

# Sales and Service Excellence

Volume 13 Number 3

The Magazine of Team Leadership

March 2013

SALES/TEAMS

## Dark Side of Teams

*Downfall of Lance Armstrong.*



by Bruce Piasecki

**O**VER THE YEARS I'VE COME to realize a great truth: *The team is more powerful than individuals.* In this world of gain and loss, something about teams expands our experience of being human. Teams extend our wings, in practical and measurable ways. They allow different types of people to succeed. Those who could not succeed as individuals can reap the benefits of success and reach peaks they could not climb alone.

The natural born leader will thrive in any team setting. Although he would likely succeed on his own, he feels better and more fulfilled when the success is shared. The rest of the team—planners, doers, specialty players, and substitutes—are people whose creativity and contribution does not easily shine because they do not have the internal spark to market themselves or stand out. Nonetheless, the mix of differences meld, and as the group comes together, the team becomes one as it triumphs.

### Sports Teams Show Us the Way

Teamwork enables the gifted and less-than-gifted to learn together where they fit. When teams are well construct-

ed with the right mix of talents and personalities—and well governed by leaders who recognize the most important capabilities in their people and facilitate them for the good of all—companies achieve, grow, and prosper.

*However, many teams have a dark side.* When dark impulses eclipse the joyful transcendence that teamwork can bring, great harm results; *people get hurt.*



*Consider the case of the team that surrounded the most celebrated cyclist of all time, Lance Armstrong.* To me, Armstrong's downfall, caused by the revelation of his use of illicit performance-enhancing drugs, is a striking example of *what can go wrong in teams.* The 10/2012 report by the U.S. Anti-Doping Agency revealed an extensive doping scheme. Armstrong was

accused of using blood transfusions, the red blood cell booster EPO, and testosterone to enhance his performance: 26 competitors (including teammates and opposing riders) verified the claims of doping; and 11 teammates documented how all the doping was centered around and for Lance.

### Seven Lessons from the Fall

Here are *seven lessons*:

**1. Avoid fierce individualism on teams.** The fact that we think of Lance Armstrong's teams as *his teams* speaks volumes—as if his *entire team* was there only for him. When we pin all of our hopes on one individual, we're often disappointed. We need the *shoulder strength of teams* to keep us competent. As leaders, we need to ensure that *the MVP syndrome* doesn't define our teams. Be alert for individuals who lose sight of the team that gave them an identity—the group with whom they worked to produce the fame for which they're known. In such situations, favoritism, sexism, and embezzlement flourish. Seek to hire *coachable individuals* rather than individual high performers. Promote and reward teamwork. Whether your efforts are centered on pay structure, group incentives, verbal recognition, send the signal that it's strong

## CONTENTS

BRIAN MORAN	
<i>Twelve Week Goals</i>	3
JUDE BIJOU	
<i>Stop Procrastinating</i>	4
DON PEPPERS AND MARTHA ROGERS	
<i>Avoid Oversights</i>	4
JOSEPH CALLAWAY	
<i>Distressed Clients</i>	5
VICKY OLIVER	
<i>Reenergize Work</i>	6
SHARON DANIELS	
<i>Customer Service</i>	6
MICHAEL HOULIHAN	
<i>Facebook or Face Time?</i>	7

SARAH SKERIK	
<i>Content PR</i>	8
MARSHA FRIEDMAN	
<i>The Pope's on Twitter</i>	8
CASIE STEVENSON	
<i>Direct Sales</i>	9
DUSTIN SAPP	
<i>Sales Proposals</i>	10
JIM DICKIE AND BARRY TRAILER	
<i>Sales Performance</i>	10
BRUCE HODES	
<i>Family Business</i>	11
BILL LEE	
<i>Customer Engagement</i>	12

BILL TATE	
<i>Avoid Bad Hires</i>	12
CHUCK INMAN	
<i>Achieve Better Sales</i>	13
MATTHEW GONNERING	
<i>Manage Digital Media</i>	14
MELISSA G. WILSON AND LARRY MOHL	
<i>Networking Is Dead</i>	14
CAROL KINSEY GOMAN	
<i>Body Language</i>	15
JERRY WEISSMAN	
<i>Breaking into Jail</i>	16
JEAN VAN RENSSSELAR	
<i>Strong Relationships</i>	16

teams that make up a *strong company*.

**2. Don't allow MVPs to dictate to or pressure teammates.** The U.S. Anti-Doping Agency report made it clear that Armstrong was driving the *doping culture* of his team: "It was not enough that his teammates give maximum effort on the bike; he also required that they adhere to a doping program outlined for them or be replaced." I know that you *cannot* do more with teams in a climate of intimidation, deception, and contract pressures. You *cannot* ride into victory more than average with that the weight of secrecy on your mind. You *cannot* make friends victims as you claim victory. This all goes against the magic of teams.

**3. Do not give victors the benefit of the doubt.** In teams, we seek to protect superstars and keep them winning (vital contributions of quieter members are downplayed). Armstrong could perpetrate his deceptions thanks to "the help of a *small army of enablers*, including doping doctors, drug smugglers, and others within and outside the sport and on his own team." We're all aware of conditions when everyone goes along with a wrong. The dark side is harder to see when victory shines so bright. We tend to look the other way, to give our victors the benefit of the doubt. We must be vigilant to ferret out corruption in the highest echelons, to bench the MVP, even to fire the superstar for the good of the team and the sake of integrity.

**4. Keep a healthy perspective.** Lance Armstrong became a larger-than-life figure because he kept winning races (even his race against cancer). He was *addicted to victory*—felt entitled to it—and this drove him to drive his team to illicit extremes. In the end, this addiction to ceaseless victory became his undoing. When we don't learn to tolerate failure, we'll do *anything* to keep the public adulation coming. If others had taught Armstrong where the tolerance of losing is mixed with the pleasure of knowing that we've tried our best, he would have proven a more dependable competitor. Great leaders are not people known to expect ceaseless victory. They are great competitors because they come to accept that *we can't always win*. Leaders teach that losing and failure are part of life and business. We must model this truth by allowing our weaknesses, flaws, and vulnerabilities to show. We must refrain from punishing teams who give it their best shot yet fall short of victory. And after a defeat, we must insist that employees get back up and compete in the next contest. In this way the pain of loss will dissipate.

**5. Revel in the pleasure of persistence and the sheer thrill of striving.** There is great fun in knowing that we will stumble and fall

from time to time, yet get up, and try again, with some success. Accepting our imperfection takes the pressure off. Only then do we free ourselves to feel the pleasure of persistence and the sheer thrill of striving. Teach teams: to be well prepared for assignments, to keep going in spite of hardship, to play through pain, to resist criminal opportunities inherent in being an MVP, to keep your feet on the ground, to outlive uncomfortable appointments, and to behave when you are chosen for teams you do not want to play on. Life can be a tough slog, and victories sporadic. Maybe you can't win, but you can keep going. Striving brings its own rewards.

**6. Encourage a sense of commonality, shared values, integrity, and commitment to one another.** In team events, a transformation occurs where team members end their individual associations and create a team identity through shared experience. A strong bond is created from that preparation, from the obstacles everyone had to overcome to get there. In business, we can create bonding experiences with off-site team-building events and weekly social gatherings—but there's no substitute for *real-world work* where people can share their progress, brainstorm ideas, and generate synergy. Together, great teams mourn losses, celebrate success, share information, and hold themselves accountable.

**7. Choose the right captains to help build teams strong enough to withstand the dark side.** Here, in the choosing and nurturing of captains, is where all of the lessons coalesce. It takes a certain type of leader to create a true team, not just a loose affiliation of fierce individualists. A *captain* can rapidly recognize the key capabilities of their team members. They can see the capacity for harm and evil and quickly disarm it. Captains also recognize the capacity for generosity and put it to use in building other team members and generating momentum. They build teams that balance the negatives in each member, making a stronger and better core. Captains don't wait for solutions; instead, they seek possible solutions and test them on the fly.

Keeping teams safely away from the dark side begins with ensuring that the right captains are at the helm. Invest in your captains. Choose them well and use them wisely. Give them authority to align and make accountable those capable of evil, harm, and generosity. They will bring the results and the profits you are looking for—and empower people to extend their wings and soar in the magic that only teams can generate.

SSE

Bruce Piasecki is President of [www.brucepiasecki.com](http://www.brucepiasecki.com) and author of *Doing More with Teams: The New Way to Winning* (Wiley) and president of AHC Group, a management consulting firm. Visit [www.ahcgroup.com](http://www.ahcgroup.com).

**ACTION: Avoid the dark side of teams.**

## Volume 13 Issue 3

*Sales & Service Excellence* is published monthly by Executive Excellence Publishing, LLC (dba Leadership Excellence), 1806 North 1120 West, Provo, UT 84604.

### Editorial Purpose:

Our mission is to promote personal and professional development based on constructive values, sound ethics, and timeless principles.

### Basic Annual Rate:

\$59 (12 issues)  
\$119 two years (24 issues).

### Article Reprints:

For reprints of 100 or more, please contact the editorial department at 1-801-375-4060 or email [CustomerService@LeaderExcel.com](mailto:CustomerService@LeaderExcel.com).  
Permission PDF: US \$100

### Submissions and Correspondence:

Please send any correspondence, articles, letters to the editor, and requests to reprint, republish, or excerpt articles to Editorial Department, Sales & Service Excellence, 1806 North 1120 West, Provo, UT 84604 or email [Editorial@LeaderExcel.com](mailto:Editorial@LeaderExcel.com).

### Customer Service/Circulation:

For customer service, or information on products and services call 1-877-250-1983 or email: [CustomerService@LeaderExcel.com](mailto:CustomerService@LeaderExcel.com).

Internet Address: [www.LeaderExcel.com](http://www.LeaderExcel.com)

### Marketing Offices:

Leadership Excellence  
1806 N. 1120 W.  
Provo, UT 84604  
1-877-250-1983  
1-801-375-4060

### Sales & Service Excellence:

Ken Shelton, CEO, Editor-in-Chief  
Sean Beck, Circulation Manager

Contributing Editors: Debbie Allen, Curtis Bingham, Tom Hopkins, Dave Kahle, Richard Ilsey.

Copyright © 2013 Executive Excellence Publishing. No part of this publication may be reproduced or transmitted in any form without written permission from the publisher. Quotations must be credited.



# Twelve Week Goals

*Accomplish more in 12 weeks, than most do in 12 months.*



by Brian Moran

**T**HE TOP FACTOR HOLDING individuals and companies back from achieving what they are capable of is not a lack of knowledge, intellect or information. It's not some new strategy, idea, or training. It's not hard work, natural talent or luck. All these things play a role, but they're not the things that make the difference.

You've no doubt heard the saying, *knowledge is power*. I disagree, knowledge is only power if you use it, if you act on it. It benefits no one unless the person acquiring the knowledge does something with it. And great ideas are worthless unless they are implemented. You can be smart, you can have access to lots of information and great ideas, you can be well-connected, work hard and have lots of natural talent, but in the end, you have to execute.

Execution is the single greatest market-differentiator. Great companies and successful individuals execute better than their competition. The barrier standing between you and the life you are capable of living is a lack of consistent execution. Effective execution will set you free. It is *the* path to accomplish the things you desire.

## The 12 Week Year

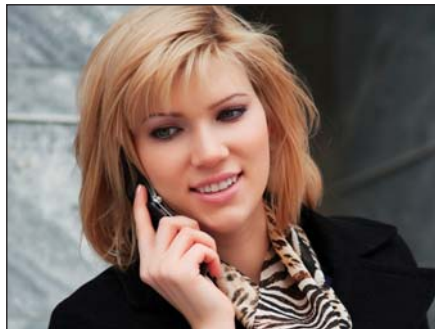
One thing that inhibits people from effectively executing and achieving their best is the *annual planning process*. Annual goals and plans are often *barriers to high performance*. This doesn't mean annual goals and plans don't have a positive impact, they do. There is no question you will do better with annual goals and plans, than without any goals or plans. However, this annual process inherently limits performance.

As we worked with clients over the years, we noticed an interesting pattern emerging. Most of them believed, either consciously or unconsciously, that their success and failure was determined by what they had achieved over the course of a year. They set annual goals, they created annual plans, and in many cases broke the goals and plans down quarterly and monthly and sometimes even weekly. But in the end, they evaluated their success annually.

The trap is referred to as *annualized*

*thinking*. At the heart of annualized thinking is an unspoken belief that there is plenty of time in the year to make things happen. In January, December looks a long way off. We mistakenly believe that there is plenty of time in the year, and we act accordingly. We lack a sense of urgency, not realizing that every week is important, every day is important, every moment is important. Ultimately, effective execution happens daily and weekly!

Forget about a year, let's redefine a year: A year is no longer 12 months, it is now only 12 weeks. That's right, a year is now a 12-week period. There are no longer four periods in a year; that's old thinking. Now, there is just a 12 Week Year, followed by the next 12



Week Year. Each 12-week period stands on its own—it is your year.

The *12 Week Year* creates a new end game date—the point at which you assess your success. It narrows your focus to the *week*, and to the *day*, which is where execution occurs. The 12 Week Year brings that reality front and center. When you set your goals in the context of a 12 Week Year you no longer have the luxury of putting off the critical activities, thinking to yourself that there is *plenty of time* left in the year. Once 12 weeks becomes your year, then each week matters; each day matters; each moment matters.

**The result is profound.** Most people experience a 30 percent gain in their first 12 weeks when operating on the 12 Week Year platform.

Here are **three steps** to help you achieve more in the next 12 weeks than most will in 12 months:

**1. Set a 12 Week Goal.** Start by establishing a 12 Week Goal. Annual goals are helpful but they lack immediacy and urgency. 12 Week Goals create

focus and urgency. Get focused on what you want to make happen over the next 12 weeks. The goal should be an outcome—income, sales production, dollars saved, pounds lost, and represent significant progress towards your longer-term vision. Limit your goals to a maximum of three, and make certain each goal is specific and measurable.

**2. Build a 12 Week Plan.** *12 Week Planning* is more effective than *traditional planning* because it is more predictable and focused. The key here is less is more. A 12 Week Plan embraces the notion of “lets be great at a few things versus mediocre at many.” For each goal, you will need to identify tactics. Tactics are the daily and weekly actions that drive the accomplishment of the goal. If the goal is the *where*, then the tactics are the *how*. Again *less is more*. Identify *four or five actions* that you need to take daily and weekly to achieve your goal—those are your tactics.

**3. Apply the Weekly Routine.** Having a goal and a plan is helpful, but it's not enough. The key to your success is executing your plan. To ensure you execute at a high level, adopt the *Weekly Routine*. If you do the following three things weekly, you'll get better!

- *Plan your week.* Take a few minutes at the start of each week to plan your week. Use your 12 Week Plan to identify the tactics that are due this week. The *Weekly Plan* is not a glorified to-do list; rather, it reflects the critical strategic activity that needs to take place this week to achieve your 12 Week Goals.

- *Score your week.* At the end of each week, you score your execution. In the end you have greater control over your actions than you do your outcomes. The most effective lead indicator you have is a measure of your execution. You are scoring your execution, not your results. Calculate a weekly execution score by dividing the number of tactics completed by the number due.

- *Meet with a peer group.* You are *seven times* more likely to succeed if you meet regularly with a group of your peers. Find two to three other people who are committed and willing to meet for 20 minutes each week. In your meeting, report on how you're doing against your goals and how well you're executing. Encourage/challenge one another.

Plan your week, score your week, and meet with a group of peers—take these steps for the next 12 weeks, and watch what happens. **SSE**

Brian Moran, President of The Execution Company, is author of *The 12 Week Year*. [www.BrianPMoran.com](http://www.BrianPMoran.com).

**ACTION: Get more done in your day.**

## Stop Procrastinating

Be much more productive at work.



by Jude Bijou

**Y**OU MAY PROCRASTINATE TO avoid an unpleasant or daunting task, but when this interferes with your performance—by causing you to feel worried, fearful, and stressed-out, or by causing others to feel anxious because you're holding up progress—it's time to stop putting the task aside and get on with it.

Here are **10 ways** to stop procrastinating and reap the benefits, including higher productivity, better mood, less stress, better coworker relationships, greater accomplishment, more sales, and restored reputation as a *doer*.

**1. Identify the situation.** First, note the task you put off; for example, converting your client contacts and notes into the new file-sharing software system and learning how to navigate its tools and folders. Writing down the task helps you dial in the job at hand.

**2. Pinpoint your emotions.** What prevents you from *diving in* to the task? It's often one or more of *three emotions*. Perhaps, you're intimidated by the new bells and whistles you need to learn (*fear*). Or you're resentful about having to do this when the old system worked well (*anger*). Or you're bummed that you're not tech savvy (*sadness*). See the procrastination as an *emotional reaction*.

**3. Deal with the emotions.** *Emotion is energy in motion*. Take time to express those emotions constructively. By crying to express sadness, punching or yelling into a pillow or stomping to release anger, or shivering for fear, you express the emotion. The energy dissipates, and you don't feel stuck.

**4. Do some planning.** Since *good planning* facilitates success, *write it down* so you have it for ready reference. Start by getting *clear on your goal*—your beacon to keep you on track in treacherous waters. For example, "I want to be facile with this new software so it's a useful tool, not an impediment to my progress." Having a *clear and precise goal* will keep you oriented and motivated.

**5. Find some truths.** Identify sabotaging thoughts that pounce in weak moments, and have a few truths to contradict them. For example, if you tell yourself *I'll never learn all this*, you might say, *I can do this* or *If others can learn this, so can I*. To neutralize your

frustration, you might say, *I'm doing this because I want to be a team player* or *My boss thinks I'm the best person to do this*.

**6. Break your goal into small, doable steps.** Now decide when you'll get started and figure out a *step-by-step plan*. Write it down, schedule it, and commit to it. Plot out each part of the task, including *details* (*whom* you'll talk with and *what* about, *where* and *when* you'll work, and *how long* each part to take).

**7. Anticipate roadblocks.** Imagine the challenges and obstacles that will likely pop up, such as other projects with shorter deadlines. How will you tackle such challenges to keep moving forward with the big task? For every scenario, have a tactic ready. And find someone to support your efforts and with whom you can *check in* regularly.

**8. Take the leap.** Before tackling the first task, acknowledge and release

your pent-up emotions in a constructive way. Without negative emotional energy dragging you down, you'll feel *prepared to take the leap* and be amazed *how easy it is* as you focus on *little steps*.

**9. Battle resistance.** You'll likely meet resistance in the form of excuses, bad moods, and discouragement. Meet resistance with tenacity, and continue to deal with any emotions that surface. Say to yourself, *I can do this. I'll feel better when I handle this*. Focus on the goal.

**10. Attend to the upside.** Getting through a daunting task is incredibly satisfying. Praise each step along the way. When you accomplish what you were avoiding, you'll feel *incredibly virtuous, more energetic and sleep better*. **SSE**

Jude Bijou, MA, MFT, is a psychotherapist, educator, speaker and author of *Attitude Reconstruction*. Visit [www.attitudereconstruction.com](http://www.attitudereconstruction.com).

**ACTION: Boosts your productivity at work.**

### SERVICE/OVERSIGHTS

## Avoid Oversights

Cement customer loyalty.



by Don Peppers & Martha Rogers

**T**O BUILD A MORE profitable business, one homebuilder gives his services away to earn his customers' trust.

When you build a home for someone, many states require you to guarantee the structure for 12 months or more.

During the legal warranty period, the builder is required to fix all structural flaws or defects at his expense. But this builder proactively phones a homeowner when the warranty period has 30 days remaining, reminds the owner that the warranty period is almost up, and suggests sending a team to examine the house for any defects, to ensure that they are repaired within the warranty period, *at the builder's expense*.

**This is the essence of what it means to be trustable.** Being *trustable* requires being *fair* with a customer, and not taking advantage of a customer's oversight or lack of knowledge, even if you might make more short-term money by doing so. Being *trustable* requires you to treat the customer the way you would like to be treated, *if you were the customer*.

Now homebuilding has few repeat customers, so a builder won't gain much financial benefit by cementing a customer's *loyalty* for future business. But this homebuilder generates referrals of

new customers at twice the rate of his competitors, and referrals represent a substantial part of any homebuilder's business. In addition, the homebuilder has an easier time hiring new employees, because *employees themselves* want to work for a *trustable business*.

A *trustable policy* costs the homebuilder something to fix defects that his customers might overlook until after the deadline, when they'd have to pay to make corrections, but the policy still generates immense long-term value.

**Customers have memories.** Whether you remember them or not, *they remember you*. When you treat a customer well

today—say, by reminding him that his warranty is almost up or by preventing him from paying too much—the customer will remember this and likely do more business with you, cost you less to serve, or possibly refer friends to you.

To build shareholder value, help customers avoid oversights: *warn customers* when their warranty period is expiring; send them an email reminder before charging their credit card to renew a subscription; advise them proactively if they are overlooking a less expensive or more appropriate option; remind them a few days before a late fee applies to their payment; warn customers when they are buying more than they likely need; and notify customers when they become eligible for a product upgrade or for a higher-value service. **SSE**

Don Peppers and Martha Rogers, Ph.D., are authors of *Extreme Trust* and co-founders of Peppers & Rogers Group. Visit [www.peppersandrogersgroup.com](http://www.peppersandrogersgroup.com).

**ACTION: Help customers avoid oversights.**

# Distressed Clients

*Don't dread them, help them.*



by Joseph Callaway

**I** URGE YOU TO CHANGE THE way you view customers in distress—those who are fearful, tearful, or angry. In a recession economy, fear takes over. People worry that they might fail to support their families, lose their retirement savings, and *never* recover. That sense of insecurity lingers, leading to stress-filled weeks that bring less pay, little thanks, and more personal problems.

When you notice that your clients and customers are distressed, you take the first step toward helping them. You likely avoid dealing with distressed clients because they can be time-consuming, indecisive, needy, angry, and even hostile. Instead, I invite you to try embracing them and doing whatever you can to make their situation better.

Deciding to *really* put clients first can change your life and transform your business. Even when clients make your life difficult, you benefit by serving them. Here are *nine tips* for handling distressed clients:

**1. Make the Clients First commitment.** You may be *comfortable* with your way of doing business, level of success, and customer relationships; however, if you want more fulfillment, growth, and money—give *Clients First* a chance. Put your own needs second, base all of your interactions on transparency and honesty; make it your priority to *always do what's best for the client*. It won't be easy: putting your own best interests in second place goes against human nature! But you *will* find that many tough decisions—like how to give your best to someone who is annoying—will practically make themselves.

**2. Realize the benefits of sticking with customers in distress.** When you help distressed clients, you build the relationship. Often, they will tell others how wonderful you are, and what lengths you went to on their behalf. Sticking with your distressed clients is the right thing to do—and it makes good business sense. Business is still far from booming. *You need all the clients you can get.* And how you conduct business now, when the going is tough, can set you apart from the competition. When you choose to stand by *all* of

your frazzled, frustrated clients, you'll eventually reap financial and personal rewards. You may even become known as *the person who can handle tough clients*—and receive referrals as a result!

**3. Learn to like people.** Do you hold yourself emotionally aloof from your clients and *complain* about their foibles to your coworkers and family, even though you're all smiles in meetings? Or do you make a genuine effort to put yourself in their shoes and learn more about them as *people*, not just as sources of income? Invite your clients within arm's length and make each one less of a stranger. Ask about their kids, pets, hobbies, and business. Clients can be difficult, but most are like you: filled with worries, hopes, and dreams. And when you know that a client is throwing a fit because she's going through a divorce or has to lay off an employee who's been with her for years, you'll be more understanding of her outbursts—and work harder on her behalf.

**4. Get comfortable with out-of-control emotions.** While we try to *leave our emotions at the door*, it's not always possible. Sometimes our fear, pain, and anger spill over. If a customer bursts into tears, don't get upset—help in any way you can. Instead of dreading emotional outbursts, think of alleviating the customer's worries, insecurities, and fears rather than reflecting their turmoil back to them. When you end animosity and frustration, you *and* the customer are better off.

**5. Remember, honesty is always the best policy.** When customers are distressed, they need the truth. Don't sugarcoat by painting a picture that's brighter than the reality. You might placate them in the short-term, but if things go south, they'll bottom out. Instead, look them in the eye and say, "This is the reality. And here's what I'm going to do." When you have a higher standard for measuring your success, you won't toy with the truth. When you're truthful with customers, you know you're doing the right thing. You don't feel as if something was left unsaid or undone.



**6. Stay competent—it's the best way to help your customers.** As foreclosures mounted, people panicked. We observed negligence all around us. The *short sale* created a new client—the *distressed seller*. To serve them properly, we invested our time and energy to be the best. We *redoubled our efforts* to remain competent. We justified our values with extensive market comparables so the banks could have confidence in what we told them. Daily, we improved our *short sale package* so that our client's file would have the best chance. We cared for our clients—and *they stayed with us*.

**7. Care, even when your clients don't.** Distress can bring with it despondence and ambivalence. Distressed clients might say, "Do whatever you want. We're screwed either way." Or, "There's just no hope. I'll have to let most of my employees go." We cared about clients who had stopped caring. They didn't care whether the bank lost money or

whether the buyer got a house in sound condition. They blamed the government, the financial institutions, their neighbors, and themselves. We had to deal with their grief, anger, and remorse. But we cared, and often our caring saved clients from their despair.

**8. Consider your karma bank.** We never *cherry-picked* clients. We served *every* client, regardless of the ROI in time, energy, emotions, and money. We believe in the *karma bank*. When times are difficult or a client is a real pill, we remember that we're making deposits in our karma bank. When it comes to karma, our efforts and goodwill come back to us multiple times over. Karma is real, and it can change your life.

**9. Help them look to a bright future.** Remember: *this too shall pass*. When your customers are up against the wall and feeling hopeless, help them look to the future. Let them know what the future will look like once the problem is resolved. There's a good chance *you* will be part of that future.

Daily we see payoffs from putting *Clients First* as past clients bring us new business. Many of them were at low points when we worked with them. *Clients First* will take you where you want to go, and take your clients where they want to go. SSE

*Joseph Callaway and JoAnn Callaway are coauthors of the New York Times bestseller Clients First: The Two World Miracle (Wiley) and founders of the real estate company Those Callaways. Visit [www.clientsfirstbook.com](http://www.clientsfirstbook.com).*

**ACTION: Help your distressed clients.**

# Reenergize Work

Try these six ways this year.



by Vicky Oliver

**Y**OUR EMPLOYEES WANT TO feel motivated, energized, and ready for new opportunities in their career. But how do they get into this mindset? A few simple behavioral techniques can quickly sweep away the blahs, get one out of a career rut, and jump start a fresh and upbeat outlook at work. I share six ways to get reenergized on the job, including How an office makeover can change one's work brain, How setting an alert on your computer could make you 13 percent more productive, and How not enough to do kills motivation—and worrying about to-dos is even worse.

Now is a great time to adopt a fresh workplace attitude and infuse your career and workplace attitude with new energy. Perhaps you resolved in 2013 to make more money, develop new business contacts, or get a promotion. Here are some tips for acquiring the motivated mindset you'll need.

**Do an office makeover.** Rearrange your furniture, upgrade your computer, change your office artwork, or get a new desk lamp or ergonomic chair. *What it does:* Changing your environment can be energizing. One study found that when bank employees improved the furniture, lighting, sound, temperature, and spacial arrangements in their workspace, it made them more motivated and productive.

**Keep busy; fight boredom.** Keep a daily task list that chips away at big goals. If you can't find enough to do, create work for yourself that enhances your career in some way, such as updating your contact lists. *What it does:* Did you ever notice that the busier you are, the more you accomplish? One researcher found that boredom and not having enough to do lower performance considerably.

**Treat your to-do hangover.** If you have a to-do list left over from last year, commit to work through it in the next two weeks. Or comb through it and resolve to do less. It's hard to do nine things brilliantly. Sometimes by cutting back on your goals, you end up accomplishing more of them. Stale tasks left undone from the previous year can have a negative drag on one's motivation, akin to a hangover. To prove this,

all you have to do is read last year's undone to-do list and notice how it makes you feel: bummed out, stressed out, and maybe even sick and sleepy!

**Stop ruminating.** In the spirit of the New Year, resolve to stop obsessing, worrying, and living in the past. Looking forward and seizing opportunities is the way to go. If you chew on your regrets, old problems, or resentments, you tend to become a low performer. You feel victimized—not a good way to gain forward career momentum.

**Revisit your network.** When you're feeling uninspired, revisit your professional network, whether it's on LinkedIn or in that stack of business cards you collected last year. Contact an intriguing person to find out what exciting plans he or she has for the coming year. You eat three meals a day—why should any of them be alone?

*What it does:* Your social network and contact database are living, changing entities that need TLC and maintenance. When you put energy into your network, you'll receive instant feedback and rewards in the form of new ideas, relationships, invitations, and gratitude.

**Take lots of breaks.** Instead of jumping into the New Year at full speed, resolve to set alerts on your phone or computer that remind you to stand up, stretch, and take a walk around the office. *What it does:* One study found that workers who set such alerts were 13 percent more accurate in their work. Breaks increase, rather than decrease, your attention and productivity. **SSE**

Vicky Oliver is a career advisor and author of 301 Smart Answers to Tough Business Etiquette Questions and The Millionaire's Handbook: How to Look and Act Like a Millionaire Even If You're Not. Visit [www.vickyoliver.com](http://www.vickyoliver.com).

**ACTION:** Try these six suggestions at work.

## SERVICE/EMOTION

# Customer Service

Emotion is always king.



by Sharon Daniels

**E**MOTION IS KING WHEN IT comes to customer service. While sales and promotions may get customers through the door, the emotional connection developed via service keeps them coming back.

In our survey of customers' expectations of a positive customer experience, we learned that two in three people prefer being treated well over having their issues immediately resolved and four in five note that how they were personally treated is more important than resolving their problem. How a customer is treated and made to feel dictates their loyalty to and opinion of a brand.

**What are the implications for your businesses?** The value of emotion is key to owning the customer experience.

**Emotion is at the heart of effective customer service, and the interpersonal skills of employees make or break the customer experience.** With ever-changing customer expectations, companies seeking ways to provide a differentiated customer experience should focus on the power of emotion. The emotional aspect of customer service is critical.

Knowing that emotion—the human connection—is at the heart of the customer experience is key to building customer loyalty and advocacy in today's socially-connected world. While slashed



prices and special promotions may get consumers in the door, an inability to connect on an emotional and human level while delivering service hampers customer engagement efforts.

Our global study, *Why Your Customers Stay or Stray* reveals that the behaviors most irritating to customers stem from detached emotional awareness and connection: 46 percent of respondents note that being rude, short, nasty, unhelpful and impatient is the greatest service mistake that they experience. Using a canned script in dealing with issues (17 percent) and saying "no" or "I don't know" (16 percent) also rank among the top customer experience failures. A negative customer experience threatens the sale and the reputation of the brand, since 40 percent of respondents admit to posting a negative review online after one poor customer experience. Customers are also quick to defect once they have been wronged (half indicate they would try a competitor after one bad experience, and 93 percent defect after two or three poor service experiences. You need to create a culture of service supported by effective employee development programs around the customer experience.

**A positive customer experience is marked by respect, simplicity, solutions and responsibilities.** Training customer-facing employees to recognize emotions and respond in a concerned, effective and professional manner is essential to owning the customer experience. **SSE**

Sharon Daniels is CEO of AchieveGlobal, and author of *Why Your Customers Stay or Stray*. Visit [www.achieveglobal.com](http://www.achieveglobal.com).

**ACTION:** Create positive customer experiences.

# Facebook or Face Time?

*Beyond texting, friending, connecting.*



by Michael Houlihan

TECHNOLOGY HAS YIELDED some great communication tools, but they are not relationship builders. The *personal touch* will always be more effective than *pixels* on a screen. Email, texting, and social media have taken over the game, but the pendulum has swung too far. Now, people are reluctant to even pick up the phone, let alone meet face-to-face.

In the wake of this *technology takeover* misunderstandings abound. *Relationships* stagnate. *Trust* is low. Genuine *human connections* have been replaced by *mouse-clicks* and *keystrokes*. Social media and technology have their place, but they never will be a substitute for in-person interaction. Your physical presence—or at least the sound of your voice—builds trust you can't even approach with a keyboard, screen, or profile image.

When Bonnie Harvey and I founded Barefoot Cellars in the laundry room of a rented Sonoma County farmhouse, we knew little about winemaking or the wine business. I visited many retailers, suppliers, and potential customers in person during those early years. I *never* would have gotten satisfactory results if I had tried to build those relationships via email and social media. The Barefoot brand would never have become a national bestseller without meetings, phone calls, and personal visits that kept relationships healthy.

People don't just buy *your product*; they buy *you*. Dependence on virtual communication stunts the social skills you need to attract customers. You create a world that provides a comfortable firewall, insulating us from personal rejection and real-time communication.

Yes, face-to-face meetings are expensive. When clients, vendors, and employees are distant, you can't always fly to meetings. Skype is the next best thing to being there. Live video streams allow you to do just about everything short of shaking hands. I use Skype often. I love that I can make eye contact with someone who is distant. We achieve much more when we become more than an email address or disembodied voice!

If you make the time for personal meetings—or via Skype or phone—others will remember and appreciate you.

Here are *seven advantages* of real-time, in-person relationship building:

**1. The time investment shows you really care.** People want to be valued and appreciated. Spending time with someone else—in person, face-to-face on a computer screen, or on the phone—conveys caring. It says, "While there are many other things I *could* be doing, I'm choosing to spend my time with you. That's how important I think you are!" *Spending time* with another person *creates a bond* that money can't buy. You find out what you have in common, share opinions, and gain valuable non-verbal clues to his or her values and concerns. When I travel with a client or colleague, I note what causes them stress and anxiety, enabling me to see how they handle situations and to learn to work together more effectively.



**2. You can give personalized attention.** This is a key to selling and establishing long-term relationships. It's hard to multi-task on something unrelated when someone is in front of you. You focus on the *other person*, responding to what they say, and to their moods, movements, and other non-verbal signals. You read these signs and adjust your behavior. When you use people's names along with eye contact and attentive demeanor, they're more likely to be agreeable. They know that your time is valuable. The more visits you have, the stronger your relationship.

**3. You're more effective.** When you talk to someone in real time, you can make progress in real time and solve problems in real time. Thanks to facial expressions, body language, and tone of voice, you'll learn more than just the basics when you have a verbal conversation. You may notice things about the other company or clients that they are not aware of! Always meet in person if you can. When an important client or critical team member is on the other

side of the globe, a face-to-face meeting can be a smart investment. The rest of the time, be sure to Skype or call.

**4. Facial expressions help get your message across.** Facial expressions are telling in face-to-face meetings, whether they're *in person* or via Skype. *Observing expressions* gives you instant feedback on how your message is being received. You can quickly adjust your message to make it more meaningful or agreeable, and to avoid misunderstandings.

**5. Body language helps you communicate.** Unlike looking at a posed profile shot or any still image sent over email, being face-to-face with people enables you to see their dynamic reaction and adjust your message. Real-time body language provides tons of non-verbal cues, and we are naturally wired to get this feedback instantly and to share our feelings and attitudes through the way we stand, sit, gesture, and more. Learn the basics of body language so you can *respond more accurately* to others and avoid sending wrong messages.

**6. Tonality helps communicate intent.** Texting, emailing, and friending can be great ways to communicate while failing to succeed at *relationship building*. When spoken, the same words used in a text or email can have a very different meaning based on the tone, inflection, and the emphasis. It's much easier to *get intentions* behind the spoken word. If the other person sounds reluctant, uncomfortable, or guarded, you can ask why and discuss ideas.

**7. Your vulnerability shows (that's a good thing!).** In the virtual world, you can control your image: you choose the pictures you post; you censor the information you share; and you edit what you want to say before you *send*. But in a real-time, face-to-face relationship, the other person can see you in 3-D and observe your dynamic, spontaneous behavior, including tone of voice, expression, dress, and body language. They see your imperfections and sense that you are vulnerable to personal rejection. *Imperfections and vulnerability make you appear more believable and sincere*. Most people will overlook foibles in appearance and speech because you are *there* for them. You take precedence over all their virtual relationships.

Becoming *personable* takes practice. Genuine, lasting, and dependable relationships take time and physical presence. *High touch* always beats *high tech*. SSE

Michael Houlihan and Bonnie Harvey are authors of *The Barefoot Spirit: How Hardship, Hustle, and Heart Built a Bestselling Wine, and cofounders of the Barefoot Wine brand*. Visit [www.thebarefootspirit.com](http://www.thebarefootspirit.com).

**ACTION: Spend more face time with customers.**



# Content PR

Represent the brand POV.



by Sarah Skerik

**W**E'VE SEEN A MAJOR SHIFT in marketing tactics with the rise of inbound marketing that generates interest rather than causes interruption. Inbound tactics (including content marketing) draw the audience to the brand, rather than push messaging out, hoping that someone pays attention. This requires a brand to be in tune with its audience, know what they're talking about (and where the talk is occurring) and creating content that speaks to the audience's interests—the genesis of content PR.

Content PR is the extension of content marketing principles, including: 1) understanding audience interests, 2) creating relevant and compelling content, and 3) deploying that content in various formats and across different channels to reach audiences.

## New Strategy and Tactics

Content PR requires shifting from traditional PR mindset and tactics.

**From episodic campaigns to ongoing presence.** Audience interest isn't dictated by campaigns. While campaigns do a great job of building interest, opportunities are lost when brands don't serve the organic interest that develops when a person has a gift to buy, researches charities related to a new cause, or researches vendors or a project at work. Content PR is crucial to developing a plugged-in brand presence that understands—and delivers—what constituents seek, and what they need to make related decisions.

**Reflecting the audience point of view in messaging.** While there's still a place for news announcements of record, savvy brands are changing their messaging to reflect the audience POV. Rather than simply issuing a message from the ivory tower to the masses, brands are communicating in the context of their customers and other constituents, building audience values into their messaging. A brand that's launching new software, for example, might develop content supporting the launch around related customer challenges. And instead of a simple text press release, the content might include an array of elements, including an infographic, slides or a video with an expert.

**Measuring pull, not push.** You need to embrace a pull mentality in Content PR—and measure pull using two metrics:

- **Search rank, and inbound search terms used to find brand content.** Looking at the search terms people used to find your web site shows you clearly 1) the terms for which your content ranks in search engines, and 2) the terms your audience is using to get to your web site. If those terms don't match the PR strategy, focus the Content PR effort.

- **Traffic to specific content—and resulting activity.** Beyond measuring visits to specific pages, ask: *Are people sharing the content published on social networks? Are they clicking on the links embedded in the content and taking the next step?* Looking into page traffic will reveal whether your audience is engaging with the content you publish.

**Collaborating with marketing.** Try

developing a consistent and coherent experience for audiences. Also, since one piece of content can trigger various outcomes, PR and marketing should collaborate to ensure the content is accurately mapped to the customer decision process, and appropriate next steps are offered, such as access to specific information or staff, case studies, and tips for doing something better.

Content marketing aims to create content that can represent the brand's voice and POV within the timelines of a person's search or buying process. When coordinated with the brand marketing efforts, content PR shapes opinion, generates lasting visibility, and delivers measurable, top-line results. **SSE**

*Sarah Skerik is PR Newswire's VP of social media and author of Maximizing Content Marketing. Visit [www.prnewswire.com](http://www.prnewswire.com).*

**ACTION: Improve your content marketing.**

## SERVICE/TWITTER

# The Pope's on Twitter

If you're marketing, so should you.



by Marsha Friedman

**H**IS HANDLE IS @PONTIFEX, and 85-year-old Pope Benedict XVI, leader of the Roman Catholic Church, can tweet in eight languages on his Twitter account. On Dec. 12, he tentatively typed out his first tweet on an iPad: "Dear friends, I am pleased to get in touch with you through Twitter. Thank you for your generous response. I bless all of you from my heart."

That's the maximum 140 characters allowed per tweet. His Holiness will want to shorten them so his 2 million followers can easily re-tweet. The pope is already a hit in Twitter-verse, which makes me wonder why he didn't sign up long ago. And how many business owners, entrepreneurs, professionals and authors are not yet using this social networking platform?

**It's time to take a lesson from the Vatican**—the pontiff took to Twitter for the same three reasons anyone with something to market should:

- **He needs to generate leads.** Part of the pope's job description is to "spread the word," and Twitter is an effective way of doing this. Like business owners, the Catholic Church must generate leads to bring in new customers. According to the Center for Applied Research in the Apostolate, while there are 66.3 million Catholics in the United States,



the growth rate has slowed, only 24 percent of those Catholics attend Mass every week, and the number of U.S. priests is declining, leaving 3,400 parishes without a resident pastor. And word of mouth to 1.2 billion Catholics can only help book and product sales.

- **He wants to keep the customers he has.** The pope wants to keep current members coming back. Interacting with them regularly through the give-and-take of Twitter helps him create a more personal relationship with them. (On his first day of tweeting, the pope responded to three questions posed by

followers using his #askpontifex hashtag.) Posting tweets regularly, responding to followers, and re-tweeting their messages will keep him in front of his target audience.

- **He has an important message to share.** The pontiff had thousands of followers even before his first tweet! Many people already expect his posts will have value for them. So far, they have. The third question that he answered was, "Any suggestions on how to be more prayerful?" His response: "Offer everything you do to the Lord, ask his help in all the circumstances of daily life and remember that he is always beside you." It's been re-tweeted thousands of times—a good sign he'll be successful on social media.

The Pope is embracing social media because he recognizes the need to remain visible and relevant. If you're marketing, that's also true for you. **SSE**

*Marsha Friedman is CEO of EMSI Public Relations and author of Celebritize Yourself. [www.emsincorporated.com](http://www.emsincorporated.com).*

**ACTION: Embrace social media in marketing.**

# Direct Sales

What it takes to succeed.



by Casie Stevenson

OVER THE LAST SEVEN YEARS I've created a five-figure monthly income from the comfort of my home while helping others do the same. However, it wasn't always this way. Being married with children at a young age brought many struggles. Seven years ago, I decided to start a new adventure. I was ready to be my own boss and put my family first!

To help you go from where you are to where you hope to be, I share 10 lessons:

**1. Be honest, dependable, responsible—do what you say you will, always keep your word.** Being honest has helped me build character, self-respect, integrity, courage, trust, dependability, and responsibility. When you say you will do something, do it. When you make a commitment, honor it. When you accept a job, fulfill it. When you borrow something, return it. When you have a financial obligation, pay it. When you agree to something, keep it. Honesty is the best and only policy to live by. As the oldest of six siblings, I did a lot of babysitting. Having responsibility at an early age helped me to become a dependable person—and later to earn money by babysitting for neighbors. If you accept a responsibility, commit to it. Don't make promises that you can't keep or take on more than you can handle. Limit your commitments and be reliable. In serving others, don't compromise your health and happiness. Being dependable boosts your confidence. People respect you more.

**2. Be persistent, steadfast, productive, and consistent—work hard on your priorities; quitting is not an option!** When I started my business, I did it for the fun of it. Since I loved the products, I knew that I would be my best customer. After sharing my business with family and friends, some soon joined me in starting their business, making my business grow quickly. Of course, there are many ups and downs, trying times—even times when I just want to run away from it all. When I look past all of that, I recognize my many happy memories—and it is all worth it! If you are unhappy in your work, reevaluate yourself, your business, your goals, and adjust your priorities.

**3. Be committed to the journey, determined to fulfill your dreams and goals.** Identify what is important to you. Plan to do what you want—and love doing it. Find your purpose. When I started my business with Scentsy, I set a goal to sell \$2,000 a month and to share the business opportunity with two people a month for one year. In doing so, I found the one thing that I loved that allowed me to fulfill my dream, to stay home with my kids—and bring many opportunities into my life. I attribute my success to setting goals and then making them real.

**4. Be different and make a difference: Believe in something greater than you.** Be You, Be Authentic, Be the one who makes a difference. One core value of Scentsy is give more than you take. When I saw one family in need, we put together a benefit auction with our Superstar Directors and raised \$21,000 in one hour for her and her family. There is power in each of us to touch another person, and opportunities come our way each day. If you are generous of your time and money, you will see the blessings in return.

**5. Be grateful: find the best in others, say 'Thank you' often.** Gratitude is a part of my daily life, language, and actions. I've taught my children to be grateful for what they have, to say Thank You for even the simplest things that they receive. I focus on positive things and recognize them. I recite a positive quote each day and surround myself with positive, grateful people.

Note the things in your life that you are grateful to have. Seeing your list helps you realize all that you have and all you should be grateful for. Decide to be a grateful person.

**6. Be Happy: smile, relax, laugh, love yourself, positive attitude, exercise, surround yourself with happy people.** At times, I've felt overwhelmed or inadequate. In nine years, I had four back surgeries. I experienced much physical pain, rehab, along with emotional challenges. My doctor put me on medication and into some counseling. Now I take care of myself, focus on the people and things that I love. Each day I ask, "What's the best thing that happened today?" This helps me look for the good things in my day.

**7. Be Giving: love others, be generous with time and money, think of someone else, give service daily, and give more than you take!** Have you

ever experienced what it feels like to give service to someone, give away \$100 dollars, deliver food to a needy family or simply give someone a meaningful hug? I try to think of others before I think of myself—to make a difference by giving of myself. When you give, you're blessed in return.

**8. Be Balanced: Schedule time for family, friends, business and self.** I used to feel overwhelmed: I felt that I had to achieve everything on my to-do list each day. My friend Adie Mitchell told me, Rather than balance your life, manage it using the Power Hour. Break an hour into four 15-minute sections:

1) Looking Down/Overview—Check my consultants report, and record my sales; 2) Looking In/Recognition—Answer emails, welcome new recruits, record advancements, and send recognitions; 3) Looking Out/Appreciation—Attend to customer appreciation, calling customers, sending Thank You's for orders and preparing parties; and 4) Looking Up/Going Forward—Evaluate

what needs to be changed to improve, adjust goals if needed, training and marketing strategies. Having a personal Power Hour first thing helps me identify what's most important to me—my priorities. Start your day with a Power Hour. Set your intentions and focus on your priorities!

**9. Be organized: eliminate clutter, use a calendar, keep things clean, and eliminate energy-drainers.** I like having things in their places so I know where to find them. I like to know what I need to get done each day instead of jumping from one project to the next. When I enter my home office, I shut the door and work on my plan of action for that day. I work on priorities first until those are done. I've been more affective since implementing this work schedule.

**10. Be adaptable—live in the present, be spontaneous, slow down, breathe, be flexible.** I don't ever want to be so busy that I can't or won't stop what I'm doing to have a little fun and create memories. Sometimes you can't control the outcome of a situation, but you can make adjustments and enjoy the journey. Slow down your life to realize the good things you have, be flexible and adapt. You can make any situation better by how you look at it and respond to it. **SSE**

Casie Stevenson is a Scentsy consultant. Visit [www.casiestevenson.com](http://www.casiestevenson.com).

**ACTION: Do what it takes to succeed in sales.**



# Sales Proposals

Six tips to evaluate them.



by Dustin Sapp

**T**HE SALES PIPELINE IS YOUR business lifeline, regardless of your product, service or solution. *Are your sales proposals up to the task?* Your sales proposals are the culmination of your sales process. In the final stage, the customer is usually exposed to only the proposal. It's often the first impression you make on decision-makers, your last chance to remind a prospect of why they should buy, and an extension of your brand that sets the tone for the rest of the relationship.

Your proposal process is due for a facelift if you answer yes to any of five questions: 1) Do you use technology to manage your proposal process? If so, is it dated? 2) Are you managing key conversations and documentation through email? 3) Are you unsure which documents are the most current with the most up-to-date content? 4) Do you lack visibility into proposals as they're being developed internally—and into how they're consumed by the prospect? 5) Is proposal collaboration between you and the prospect or between you and the rest of your team, clunky and disorganized? These questions highlight the big issues plaguing the proposal process—and they're examples of why 90 percent of proposals don't convert.

## Evaluation Checklist

Creating a proposal that converts to sales requires crafting personalized sales documents that your prospects will appreciate, interact with, and sign. To evaluate your sales proposals, use this *six-item evaluation checklist*:

- **Is it organized?** Is the proposal so well organized that decision-makers can easily search through it and find what interests them most? Can they easily understand this proposal? Are all sections organized logically?
- **Does it address the prospect's pain-point?** List the *pain-points* you noted when conversing with the prospect. Then, tell the prospect how your company can help them succeed. Directly address the *prospect's needs*: articulate the problem and the impact your solution will have on their business.
- **Are you pinpointing your value without compromising the prospect's needs?** Draw a clear correlation between today's inadequate reality and tomorrow's

impressive results and position your offerings as an investment that will pay for itself many times over. Use *case studies* to show the results your product, service, or solution can bring. Use an *analytics tool* that enables you to track prospect's activities on your website and blog, and tailor communication to strengthen the relationship and their commitment to your brand.

- **Is it engaging?** Your proposal must be *professionally written*, *easy to absorb*, with little industry jargon or confusing technicalities. *Make the problem and solution easy to understand*. If your proposal is hard to read, prospects will assume you are hard to work with.

- **Have you optimized your proposal viewing experience with technology?** With the inefficiencies of offline documents (Word, PDF, Excel, PowerPoint) turn to technology and web-based

solutions to improve the proposal creation and viewing experience and to track proposal activity.

- **Does it address pricing and timeline?** No prospect likes *ambiguity* when it comes to how much they need to pay and how long things will take. Let them know your estimates. Outline *tactics* and *goals* with *dates* to accompany each. Think through the prospect's pain-points and devise a strategy to make the prospect successful.

**Prospects will only buy what you're selling if they're convinced you can help them solve their problems and improve their processes.** So, make proposals *engaging*, *relevant*, and *positioned around their needs*, how you can help them. **SSE**

Dustin Sapp is President of TinderBox, a cloud-based software solution that helps improve all aspects of the sales process. Visit [www.gettinderbox.com](http://www.gettinderbox.com).

**ACTION:** Meet these guidelines before sending proposals.

## SALES/GROWTH

# Sales Performance

Growth plans take a big jump.



by Jim Dickie and Barry Trailer

**H**OW CAN COMPANIES BEST LEVERAGE people, process, technology, and knowledge to improve the way they market to and sell to customers?

For two decades, our surveys of sales effectiveness have tracked the evolving role of sales, revealing the challenges that impact sales performance, and show how companies address them.

We recently released our *Sales Performance Optimization (SPO)* study. Over 1,200 firms worldwide took part, providing input on over 100 metrics, yielding a wealth of insights into how sales organizations performed, the challenges they face, and what firms are doing to address these challenges.

**The number of salespeople meeting quota was 63 percent.** This, in turn, contributed to revenue plan attainment of 88 percent! Delivering consistent results against last year's higher revenue targets reflects an improving business climate but is, nevertheless, impressive.

2013 brings its own challenges with both higher revenue targets (16.4 percent higher, on average) and plans for significant growth (12.2 percent, on average) in sales organizations during a time of the lowest levels of sales rep turn-

over ever recorded. "The immovable object (reps staying put) and the irresistible force (growing orgs) means something's got to give. We'll likely see a spike in turnover/rep movement this year.

The report also highlights other trends. Social selling in B2B won't grow as fast as everyone thinks, mobility will be bigger, and Big Data could be huge. While social media has seen big increases in numbers of users, benefits are still uncertain. But individual reps and companies are showing great enthusiasm for tablets and other mobile devices. This isn't just about displaying traditional data on mobile devices but rather leveraging these devices in new ways.

Assembling, analyzing, and leveraging operational as well as sales data continues to fuel Big Data's promise but companies are still trying to figure out the best way to do this. Enhancing lead generation, and better alignment between sales and marketing are high

on the list of planned initiatives but the real payoff from these comes when combined with consistent sales process implementation. It would be terrific if marketing generated all leads, but most reps remain self-reliant. When firms in which marketing generates most leads are compared with those where reps generate most leads, the difference is not great. It was only when sales process is added to the mix that it appears the reps get more leads and are more effectively executing with these leads. **SSE**

Jim Dickie and Barry Trailer are managing partners of CSO Insights. Email [Jim.Dickie@csoinsights.com](mailto:Jim.Dickie@csoinsights.com) or [Barry.Trailer@csoinsights.com](mailto:Barry.Trailer@csoinsights.com). Call 303-521-4410.

**ACTION:** Boost your sales performance.

# Family Business

*Proceed with great caution.*



by Bruce Hodes

**I**F YOU WERE CHARTERING A private plane, would you rather it was flown by a competent pilot or by a member of the business owner's family? In this scenario, who really cares about family affiliations? You most likely want the best person for the job of getting you in one piece from Point A to Point B.

If you have family members in your company, you need to proceed with caution; along with potential benefits, there are clear pitfalls the savvy you should guard against.

## What Do Owners/CEOs Want?

Business owners and CEOs want their companies to be run in the best possible way. Who can best provide this direction? Could the best candidate be a family member? Yes, after all, these employees may have grown up in the business and been schooled by the founder. They may be steeped in specialized knowledge, fit into the company culture, and understand its winning formula. They could know and love the business and its customers.

Here are stories from *four family businesses*. Each is followed by advice.

**1. The head of the pack.** Family members can lead businesses successfully. For example, Ralph and Samantha, a brother and sister team, are growing their commercial laundry service. These second-generation owners grew up working *in* the business. They drove trucks, brought in clean uniforms, took out used ones, filled washers, hung pants, answered phones. They have been cussed at and complimented and, have mastered both operations and customer service. They are capable people who learned the business from the ground up. They also gained experience outside of their industry and applied their experiences to the family firm. Ralph has an MBA from Harvard and worked as a financial analyst. Samantha has a Master's in education. Their ability to lead and develop their family business is obvious.

**2. Pretending in order to please you.** Often children join a company because they feel they *owe it* to a CEO parent to carry on the *family tradition*—despite

having little talent, passion, or ability to succeed in the business. They spend their time attempting to hide this. Meanwhile, other employees go along with the pretense to protect their jobs.

This creates many problems. For example, Roberto was an artist who just wanted to paint, be with his son, and sell his artwork. Sadly, he inherited a failing company, co-owned by another family, and became the head of marketing and web design, though he had little experience or education in either. His experienced and talented staff did their best to cover for him, but this only made the company look bad. Brochures were sent out with the wrong pricing. Total sales decreased. Employee morale and productivity suffered. The company continued to limp along. The business suffered from everyone's good intentions.

**3. My mother the boss.** In another situation, the CEO and her daughter, Sally, both lived and worked together. Sally was making \$40,000 a year and complaining about it. The CEO (*Mom*) was trying to find something for the 25-year-old marketing major to do. She admitted that if her daughter were not family, she would let her move on. "She should look for another job," the CEO told me. "What should I do?" The CEO was operating from a *mothering* state. And *mothers don't fire their youngest daughters*.

Looking at *business situations* from a parent's perspective is difficult. But once you put on your CEO hat, a pathway opens up. As CEO, the decision about *who belongs in the company* is of primary concern. If you have the *right people* doing the right stuff, your companies will invariably win. So, honestly evaluate whether family is a fit.

**4. Choosing your work.** Parents owe their children food, shelter, love, medical care, education, guidance, and coaching. However, *they do not owe their children a job*. Families and businesses have different dynamics, and when these systems compete with each other, prepare for catastrophe. For example, when Ernest (chairman of a manufacturing company) died, he left *directives* in his will, dictating how the company should be run. One son would be CEO, and one daughter would be SVP of manufacturing. However, the directives were not fulfilled. Instead, elderly Mom, who had little to do with the business, was now majority owner and

put herself in charge. She made wrong decisions and put the company at risk. Meanwhile, the son and daughter did not get control or ownership of the company they had built. Turning this company around would be easier if it weren't so encumbered with family issues. *The leadership in your company should be based on talent and ability*. If family members qualify, consider it a dividend and karmic reward.

**Often the best move for family business owners is to replace themselves as president** and bring in someone else with more leadership skills, ability, and talent who can develop the company. For example, for years, Johnny complained of the burden of running the \$250 million company that he had grown with his dad. He finally made Laura—a talented operations VP and not a family member—the president. The company achieved its financial targets and opened a new plant.

Johnny is now semi-retired—he recognized he was *not the right person for the job* and replaced himself in the role.

## Rules for Relatives

Leaders will destroy the growth of their companies if they have *lower standards* or *different rules* for family members. If you have fami-

ly members in your business, do these four things:

**1. Set high standards for family member behavior.** Make sure they accept their responsibility to *exemplify company values beyond what other employees do*. Make it clear to them that because they are family, *more* will be expected (work harder and longer hours).

**2. Place family members in roles** where they have the abilities and talent to excel and bring real results.

**3. Actively encourage family members not to work at the company;** if they decide to do so, reinforce that it is a choice they are making.

**4. Don't try to solve unresolved issues** with your siblings, cousins, children, or spouse by working together. Go see a therapist—leave the business out of it.

Not managing family relationships can ruin the business and family. Use these principles to promote family and business harmony and growth. **SSE**

*Bruce Hodes grew up in his family's boating business and founded his company CMI, developing executive leadership teams. He is author of Front Line Heroes. Email bhodes@cmiteamwork.com, call 1-800-883-7995, or visit www.cmiteamwork.com.*

**ACTION: Have clear rules for family relatives.**



## Customer Engagement

Get customers marketing and selling.



by Bill Lee

**M**ARKETING IS IN THE MIDST of a major shift from developing loyal customers to developing advocates. To get your customers marketing and selling for you, you need to learn the secrets of customer engagement. Firms that unleash customer advocates in ways that spur rapid, organic growth share *five traits*.

**1. They think bigger about customer value.** Most firms are locked into seeing customers as mere purchasers of their products or services. But purchasing is just one way that customers can create value. For example, Deena Zenyk, Marketing Manager, Customer Advocacy Programs at SMART Technologies, reports that the firm has built relationships with 900 brand advocates who, on average, represent \$130,000 per year beyond their purchases. They harvest great value from customer advocates.

**2. They create Apple-like customer advocates.** Rob Meinhardt, CEO of KACE (acquired by Dell), shows how a firm that makes mundane products—such as *enterprise software*—can develop advocates as passionate as Apple's. He says companies that think they can't compete with the excitement of Apple are missing the point. "It's about *making an important difference in customers' lives*," he says. KACE is creating *Apple-like customer advocates*—and you can too.

**3. They have an advocate CEO.** Marketing departments often can't leap into customer advocacy alone—they're too tied to traditional approaches. So, it takes a CEO. For example, Chuck Ball, who runs AmerisourceBergen's Health Systems business, led a *strategic customer engagement and advocacy initiative* that improved strategic direction, won new business, and gained alignment.

**4. They build—and innovate—customer communities.** Would you rather sell to an *amorphous market of strangers*, or to *vibrant communities that include your customer advocates*? Buyers want to engage with their peers, and communities are the way to reach them. Senior Director Sydney Sloan shows how Jive Software creates exceptional synergies between *customer support communities* and *customer reference programs*: "Marketing to your customers can create a revenue-generating engine that supports referrals, renewals, and license

expansion." Jive Software is integrating its *customer references* with *customer communities* to expand *customer advocacy*.

**5. They prepare for growth.** Rapid-growth business must scale its *reference and advocacy programs*, or risk losing its edge. Charlotte Lilley, who runs customer programs for Box, makes the most of limited time and resources, reduces the labor intensity of her job, and identifies the best vendor and technology resources to help Box grow rapidly.

Technology can *automate* many labor-intensive tasks of *reference and advocacy programs*, notes Marketo's Heather Watkins, but *advocacy managers only use 10 percent of available capacity!*

Today power has shifted dramatically to buyers who use their own resources to check out businesses and their offerings.

The imperative is to get your customers marketing and selling for you.

**One key area is content creation.** Customer content is king in today's mobile and app-infused world. Arm your sales team with the *right* customer content at the right time to unleash social advocates. Rapidly turn *customer promoters* into *advocates* who create *higher awareness and more lead generation*.

**Learn from innovative practitioners** how to get elusive *marquee brand customers*—who often refuse to advocate—to do so. Move from *chasing customer references* to *attracting customer advocates*. **SSE**

Bill Lee is CEO of Customer Reference Forum and Lee Consulting Group, and author of *The Hidden Wealth of Customers* (HBR Press). [bill@customerreferenceforum.com](http://bill@customerreferenceforum.com).

**ACTION: Make the case for customer advocacy.**

## MANAGEMENT/HIRING

### Avoid Bad Hires

Do smart media screening.



by Bill Tate

**I**N TODAY'S ECONOMY, WHERE jobs are scarce and the competition for open positions is fierce, how can you know that you've selected the perfect candidate? You have face-to-face interviews; you do background checks, fingerprinting, and drug testing; and you call references. But what else should you know?

Unfortunately, no company is immune to inflated resumes. Hiring needs to be thorough and precise, since new hires soon become *the face and voice* of your company. Executives often appear in print, television, and online media outlets. You want your company to carry a positive brand image, and this can be quickly damaged with a bad hire. So, **you must know more about candidates than what they give you on a resume or in an interview.**

Many screening packages only look at qualifications, work history, education and public records. To develop the big picture, many companies add *media screening*—a search through various databases to access sources such as newspapers, trade publications, professional journals, articles, and transcripts. The results can include award nominations and other achievements by the applicant, and community and industry association involvement, business and job disputes, references to criminal activity, or other negative information.



**Media screening is not the same as social media screening.** Media screening practices go beyond what the candidate shares with you in interviews but doesn't cross the line into the *personal* aspect of social media checks. *Media screening* pulls back all results from published items and periodicals that include the individual's name and other defined criteria. This screening can help you see the kind of person you're hiring beyond the office setting.

*Media searches* can complement your background screening efforts by providing information about incidents or investigations that may not be reflected in official records. *Has the individual been unfavorably portrayed in the news?*

*Are they involved with an organization that has a conflict of interest with your company?* Media screens also highlight the *positives* that might not come through in interviews.

Some companies use *Social media screening* since social networks provide more information about job candidates. However, sorting through a *personal social media profile* can be time-intensive, and there's always the possibility of same names and false identities. These issues apply to a basic *Google search*. Employers need to weigh the information *published* vs. what has been *posted*.

Broadening screening to include *media screening*, *litigation screening*, *corporate affiliation searches*, *bankruptcy records*, and *tax liens* is essential to making *good hiring decisions*. You are hiring a *person*, not just a *skill set*. **SSE**

Bill Tate is President of HR Plus ([www.hrplus.com](http://www.hrplus.com)), a leading background screening company.

**ACTION: Do smart screening when hiring.**

# Achieve Better Sales

*Control chemical brain freezes.*



by Chuck Inman

**K**RISTY HAD FINALLY WORK-Ed her way to the front of the store after standing in line for 45 minutes with about 30 other people with their holiday packages at one of the mail (shipping) stores in a mall. The two women working behind the counter were frantically trying to take care of customers, as the line grew increasingly longer with each passing minute. Close enough to the counter now, Kristy was able to overhear one of the women behind the counter utter to herself "Oh no, the computer screen blacked out." One of the two computers had crashed, as the two behind the counter exchanged one of those "Oh no!" glances at each other.

Instead of addressing those waiting in line, both employees just kept their heads down and kept working. People in line got anxious and tempers got short, as they noticed that the line was getting serviced by only one of the employees. Kristy again overheard one clerk tell a customer, "This computer crashes all the time." Obviously they weren't prepared for an event that appeared to happen frequently. Both ladies seemed to have lost much of their thinking capacity. They were knocked out of the moment and lost an opportunity to connect with customers.

If they had stayed in the moment, they could have *addressed the customers* and told them they had a computer problem and were rebooting. It would take a couple of minutes. They could have used the opportunity to get the customers to play: Who would like to share their plans for the holidays? We'll give a small gift to the person travelling farthest for the holidays. They could have done a quick raffle of one of their office items to keep customers engaged.

Do you remember those hot summer days as a kid when you would go to a convenience store and get a slurpee to cool down and after a few slurps or gulps you would get this searing pain in your forehead? Remember how this physical *brain freeze* would render you useless for about 20 seconds until the pain went away?

*There is another type of brain freeze,*

which is a chemical reaction our brain performs when we are under anxiety or stress. It is called a *chemical brain freeze* (CBF). This is a primitive but effective way the brain copes with the stresses and difficulties in a chaotic world. Our brain is trying to keep us alive and it takes on the role of our triage center. *Fight, flight or freeze*, our brain will shut down the more complex thinking brain in order to get out of the situation and allow us to cope better. However, we don't always perform at our best when the brain shuts down the thinking mind.

*Remember that time you got so mad you couldn't think straight? Or got called on in a meeting and you were unprepared for the answer?*



These situations don't have to be life threatening for that to happen. They can be as simple as having your computer shut down in front of customers.

When we are prepared and "stay in the moment," we utilize all of our mental resources available and get creative. When you're not prepared you can impact your customers in a negative way. Your reaction to a stressful situation can cause your customers to react in a quick decisive way that has them leaving your business and not coming back.

Here are *four key areas* to help you connect with customers during stressful situations:

**1. Stop what you are doing for a moment and step back to analyze the situation.** Recognize the fact that your customers are going to be observing you whether you acknowledge them or not. So step back and try and gain an overall perspective of what is happening at the moment.

**2. Take a deep breath.** By taking a deep breath you stop the chemical brain freeze that is beginning to hap-

pen. Shallow breathing causes your heart to race and your brain to dump survival chemicals into your system. Deep breathing eliminates that process.

**3. Engage the thinking brain again by asking yourself some key questions.** What impact is this going to have on my customers? If I were a customer how would I feel? How would I want to be treated? What would be a simple solution from the customer's perspective? By asking these questions the thinking brain becomes engaged again and you can start using your creative resources to their capacity. You can start by asking them questions. Sometimes it is a short-term solution, while other times it takes some longer-term decisions to meet their needs. Make sure your actions are directed toward helping them with their problem.

**4. Be prepared for problems, especially if a particular busy time or complex situation is anticipated.** Run through some scenarios if things don't go right or as planned. In a cockpit when the Caution/Warning Signal flashes, the pilots have been trained to handle problems associated with signals. What options are available? How can you turn a less desirable situation into an opportunity to show the customer you care about their business and loyalty? The more prepared you are the better you will be at handling difficult situations.

*Controlling Chemical Brain Freezes is not easy.* They typically happen when things don't go according to plan. If you don't take control of the situation you can wind up with unsatisfactory results. In Kristy's case, she watched as the people in line slowly started talking amongst themselves and probably starting having their own chemical brain freezes. One by one people started leaving the line and walking out the door. The long line of customers dwindled down to single digits. How much lost business happened that day? How many unhappy customers would tell others about the poor service and how many customers would *never come back*?

Know that chemical brain freezes can happen to all of us and be prepared for something not to go right. The more we can anticipate something going wrong the better prepared we are to help our customers during these difficult times.

SSE

*Chuck Inman is a leadership and emotional intelligence specialist, keynote speaker, trainer, coach and founder of Crystal Clear Motivation. Visit [www.ChuckInman.com](http://www.ChuckInman.com).*

**ACTION: Connect better with your customers.**

## Manage Digital Media

*Sales professionals must do better.*



by Matthew Gonnering

THE DAYS OF SALES PROFESSIONALS lugging around physical samples are mostly behind us. Today you rely on *digital media*, whether it's product images, video demos, walkthroughs, instructional materials, white papers, or other *digital assets* that help you communicate value to your leads and prospects.

Since you likely spend some time putting together materials designed to appeal to audiences in certain regions, industries or segments, you need an easy way to get the right media to the right people at the right time.

Here are just *five ways* for you to streamline your digital asset workflows, enabling your sales force to focus on what it does best, selling:

### 1. Centralize your media library.

Except in rare situations, there's just *too little benefit* and *too much risk* involved to justify having your digital assets spread out across more than one location. Doing so invites redundancy and confusion, especially if there aren't strict protocols in place that help people figure out what media is housed where. At the best, disparate storage adds to the time it takes any one person to retrieve the assets they need for a given task. What *centralization* requires varies. It usually makes the most sense to put all your stuff in some cloud storage location. Whether that's a digital asset management solution or some consumer option like Google Drive or DropBox, centralization beats letting your assets live on multiple people's hard drives or various in-house servers any day of the week.

2. *Get a handle on your repurposing processes.* Any given asset might be destined for various media. Whether it's print, web or video, you'll need to deliver your digital assets according to certain size, color and other specs to ensure you're represented correctly and consistently. Certain systems enable you to save one master asset and convert it into various formats as needed. Any digital asset management software will perform such conversions, for instance. If you don't have such a system in place, at least make sure that anybody in a position to use or distribute your media has a thorough understanding of the file conver-

sion options and why they matter in different channels.

### 3. Collaborate around your library.

These days, it's hard to imagine any business communication that doesn't involve digital assets. It makes sense, then, to keep much of the creative process close to the place those assets live. Having collaboration tools built into or integrated with your system of managing assets will help ensure that your users don't struggle with new learning curves and that you don't end up with conflicting versions of your assets floating around out there.

4. *Know the numbers.* Like *Web traffic*, *ad conversions* and *view counts*, there are numbers you should follow to better understand your digital assets and the effectiveness of your DAM system. Having a way of tracking those numbers, therefore, is vital.

If you know how frequently a product image is downloaded by users or staff, for instance, you might make different decisions when it comes time to shoot an updated set or photograph a new line (or when it comes time to request imagery from your suppliers).

5. *Get people excited.* Get your team to buy into the use of your software, systems, and protocols. Depending on the system you're promoting, the size of your firm, and the intended users, the methods you use to get stakeholders on board will vary—from a clear, concise email to a full-blown media campaign. Whatever it takes, it's worth it when you see your marketing operation running well. **SSE**

Matthew Gonnering is CEO of Widen. Visit [www.widen.com](http://www.widen.com).

**ACTION: Streamline your digital asset workflow.**

## SALES/CONNECTIONS

### Networking Is Dead

*Make connections that matter.*



by Melissa G. Wilson and Larry Mohl

YOU CAN MAKE MORE SALES AND CREATE more opportunities when you build your network with quality, not quantity, and build a support system that thrives.

Most networking connections are relationships that are often one-sided, transactional versus relational, opportunity limiting versus opportunity expansive. One situation binds you together, and when it dissolves, nothing is left of the relationship to keep it going.

*Making connections that matter* starts when you *connect authentically* to engage with those you meet and to learn what matters most to them. *Why you want to connect* is more important than *what you want* out of the connection. So, instead of *networking*, start *Networkling*—creating *online communities* to accelerate brand growth, sales, and innovation inside and outside your firm.

*Networkling is creating mutually beneficial exchanges* with *like-minded* and *like-valued* people. *Networkling* partnerships are fun and get results *three to five times faster*. Be open to the idea: *relationships first, opportunities second*. Ask yourself, *would you rather work on a good opportunity with a great person or a great opportunity with people*

*with whom you have no synergy? Anything is possible when you have great connections.*

*Make social media marketing and business development easy and enjoyable.* Connecting with others who share your values and principles is more important than connecting with people who are simply in the same field. You need to build a *strong network* so you can thrive—and others can thrive through you. Learn how to deepen relationships while establishing new ones, connect across their company to strengthen their business, find people with similar values, and leverage connections instead of being overwhelmed by them. Seek to learn: *Which social media outlets are best for building a great network? What is one thing you would do differently today when building your social network? What's the first step for someone who doesn't know many people?*

**Employ these two tactics:**

1. *Have 10 or fewer key people you consider partners and spend 80 percent of your relationship-building time with them.* These partners are participants in regular exchanges of emotional support, information, knowledge, promotional support, and leads and referrals for new business or career opportunities. This is called *The Support Exchange*.

2. *Become a Networkling Influencer.* Start *connecting people*. You can become a *top influencer* and create many opportunities for yourself and others. **SSE**

Melissa G. Wilson and Larry Mohl are co-authors of *Networking Is Dead: Making Connections That Matter*. Visit [www.melissagwilson.com](http://www.melissagwilson.com).

**ACTION: Become a Networkling Influencer.**

# Body Language

10 simple and powerful tips.



by Carol Kinsey Goman

**I** OFFER 10 SIMPLE, POWERFUL tips guaranteed to give you a nonverbal advantage!

**1. To boost your confidence before an important meeting, replace your smart phone with a newspaper.** You know the importance of projecting *confident body language* in a meeting, job interview or sales pitch, but you may not realize that how you sit in a reception area has much to do with your *initial impression*. Holding your body in expansive *high power* poses (standing tall with shoulders pulled back, widening your stance, spreading your arms to expand into space) raises *testosterone* (hormone linked to power and self-confidence) and lowers the stress hormone, *cortisol*. This hormonal effect is reversed when you contract yourself physically, (hunch your shoulders, tuck your chin down) assuming postures that make you look defensive, lacking confidence. Now picture yourself waiting for an important meeting. Are you bent over your smart phone, elbows pulled into your waist and shoulders hunched? Or are you sitting up straight, feet firmly on the floor, arms spread wide holding an open newspaper? When you are called into the meeting, *what hormones dominate your body chemistry?*

**2. To reach an agreement, send early engagement signals.** Parties are more likely to agree if they begin a negotiation by displaying engaged body language (smiling, nodding, mirroring, open gestures), whether the display comes from an unconscious reaction or a strategic decision.

**3. To spot a liar, look for four tell-tale signals.** Nonverbal cues to *unconscious giveaways* tend to occur in clusters—a group of movements, postures and actions that point to a particular state of mind. This is true of *dishonesty*, where one specific cluster of nonverbal signals is a highly accurate indicator of *deception*. These are: hand touching, face touching, crossed arms, and leaning away. If you see these *tell-tale signs* being displayed together, watch out!

**4. To make a difficult task seem easier, smile.** Charles Garfield, the author of *Peak Performance*, once coached the Russian Olympic weight-lifting team.

He noticed that when team members lifted to exhaustion, they would grimace. He encouraged the athletes to *smile* when they got to that point of exhaustion. This difference enabled them to add two or three more reps to their performance. No matter the task, when you grimace or frown while doing it, you are sending your brain the message, *This is really difficult. I should stop*. The brain responds by sending stress chemicals into your bloodstream. And this creates a vicious circle: the more stressed you are, the more difficult the task becomes. Conversely, when you smile, your brain gets the message, *It's not so bad. I can do this!*

**5. Rearrange your office to encourage collaboration.** If projecting power, authority, and status is part of your nonverbal strategy to impress clients, customers, and investors, arrange your office space as a visual symbol of you and your company's brand. However, when it comes to building collaboration within your staff, status and authority cues send unwanted messages. If creating a *collaborative culture* is key to meeting your business goals, arrange your office to reflect this. For example, seating people directly across from your desk (especially if their chair is smaller and lower than yours) places them in a competitive (and disadvantageous) position. Instead, try putting the visitor's chair at the side of your desk, or creating a conversation area (chairs of equal size set around a small table) to encourage a feeling of informality, equality, and partnership.

**6. To reduce resistance, hand out your business card.** People who are defensive, guarded or resistant may protectively *fold their arms across their chests* and *cross their legs*, signaling that *you're not making a positive impression*, and what you're saying isn't being listened to closely. To neutralize such resistance, offer the individual a cup of coffee or tea. You could hand out your business card, brochure, or product sample. With a large audience you could ask questions that invite people to raise their hands (*How many of you*

*have had previous training in nonverbal communication techniques? How many of you have never thought of body language as a leadership tool?* It doesn't matter which strategy you choose, just as long as people are obliged to change their postures, to uncross their arms and legs, to respond to you. Because body positions influence attitude, the mere act of unwinding a resistant posture will begin to subvert the resistance.

**7. To maximize your authority, curb your enthusiasm.** If you're an extrovert, you most likely make a favorable first impression—because we are drawn to passionate people whose emotions are easily read. But when your communication style lacks subtlety, your over-exuberance can overwhelm (or exhaust) an audience. To minimize your authority, minimize your movements. Take a deep breath, bring your gestures down to waist level, and pause before making a key point. When you *appear calm*, you look *more powerful*.

**8. To defuse a tense situation, realign your body more congenially.** Strong verbal argument often comes from a person's need to be heard and acknowledged. If you physically align yourself with that person (sitting or standing shoulder to shoulder facing the same direction), you defuse the situation. If you square your body to the other person or move in closer, you may *escalate the argument*.

**9. To seal the deal, make a positive last impression.** After you've settled on a price, signed the contract or accepted the job offer, make a *winning exit*: Stand tall, shake hands warmly, make eye contact, smile, say *thank you*, and leave your counterpart with the impression that you are someone he or she should enjoy dealing with in the future.

**10. If you seek to improve your body language, let your team know you're doing it.** To create a collaborative work environment, use more inclusive body language. *Be upfront with your staff* by saying, "I'm going through some training to improve how I connect with others." Your team can then look for changes and understand (and support) what you are trying to achieve.

By following these 10 tips, you can greatly increase your *nonverbal impact*. **SSE**

Carol Kinsey Goman, Ph.D., is a speaker, leadership communications coach, and author of *The Silent Language of Leaders* and *The Nonverbal Advantage*.  
CGoman@CKG.com, SilentLanguageOfLeaders.com.

**ACTION: Project desired body language.**





## Breaking into Jail

*The elephant IS in the room.*



by Jerry Weissman

**J**AIL BREAK FILMS HAVE LONG been a staple of Hollywood, but one former prisoner of the California State Prison/Sacramento, one Marvin Ussery, attempted to break into the jail. Although he claimed that he was only *reminiscing*, prison authorities suspected that he was trying to smuggle in drugs, tobacco, or mobile phones to sell to the inmates. However, a search didn't find any contraband on him, so his motive remains a mystery.

In business, *breaking into jail* has a different connotation: *offering negative information voluntarily*. Revealing a liability raises doubts in the audience's minds about a company's viability. However, there's a good reason for such revelations—*accountability*. In presentations, *the elephant in the room cannot and must not be ignored*.

**Accountability is mandatory in some cases.** The SEC requires that a company selling stock to the public for the first time must include a *Risk Factors* section in the Prospectus for their IPO. But the road show presentation of the offering isn't required to use the Draconian language of the prospectus. Nor is there such a requirement for other business presentations. Yet *all presentations must be forthcoming about bad news*, or the presenter will be perceived of as having something to hide.

The challenge is *when and how* to handle the revelation. The *when* has two options: 1) *Be preemptive*—include the negative information in the body of your presentation; and 2) *Be reactive*—wait until a question comes from the audience, and have a *prepared response*.

**Each option has a risk.** Offering negative information is *breaking into jail*, admitting guilt, and raises an issue that the audience may not have considered. Waiting until a question is asked can appear evasive or concealing.

Regardless of which option you choose—the choice is a judgment call depending on the situation, the audience, or the presenter—you must then make full disclosure by acknowledging the negative. Then, follow up immediately with the actions that you and your company are taking to rectify the problem or to prevent its recurrence.

If your bad news is about: *a down*

*quarter*, describe your efforts to stimulate new sales; *the loss of a key customer*, explain your efforts to win a new customer; *the resignation of a key executive*, talk about your search outreach; *a delayed product release*, lay out your accelerated production schedule; *a failed product trial*, list the corrections you are making; *a critical comment by an important thought leader*, find a more positive opinion and quote that person.

Be candid about *what keeps you up at night*, but *immediately* follow up with what you are doing about it. Be candid about your bad news, but *immediately* follow with what you're doing about it. Acknowledge that the elephant is in the room—and then lead it out.

Imagine: Your PowerPoint deck is loaded, and it's your time to shine. But

are you well prepared? If you're pressed for time and stressed by having to stand in front of an audience, you may take short cuts or simply wing it and fail to achieve your objectives. There is no second chance to make a first impression.

**Create and deliver powerful and productive presentations**—learn the art of telling your story, what words *inspire* confidence, how to design effective slides, how to practice and deliver a power presentation, and how to handle tough questions. Be *transparent*—or be *trapped*. Don't avoid the elephant in the room—be accountable. **SSE**

*Jerry Weissman is president of Power Presentations and an executive coach. This article is an excerpt from his new book Winning Strategies for Power Presentations (FT Press). Visit [www.powerltd.com](http://www.powerltd.com).*

**ACTION: Deliver powerful presentations.**

## PR/RELATIONSHIPS

### Strong Relationships

*Most personal rules don't apply.*



by Jean Van Rensselar

**Y**OU CAN'T APPROACH A *business relationship* the same way that you do a *personal relationship*—the expectations and boundaries are different. *Business relationships* are similar to *personal relationships* in two ways, different in six ways:

**Here are two similarities:** 1) *Time*. They both require time to develop. You can't expect to have a strong *personal relationship* after one or two encounters, and you can't create a strong *business relationship* at a single networking event. 2) *Mutual Respect*. No *personal relationship* can survive without mutual respect, and neither can a *business relationship*. When one party starts feeling *devalued*, it's usually the beginning of the end.

**And here are the six differences:**

1. **Value exchange (mutuality):** This is the #1 difference. All *business relationships* are built on value exchange—money in exchange for a product or service. While there is some element of mutuality in *personal relationships*, equal value exchange is rarely a reality.

2. **Boundaries:** The boundaries of a business relationship are narrower. As personal relationships develop, boundaries tend to widen, but this is not as true for business relationships.

3. **Accountability:** This is a prerequisite for business relationships—meaning both parties need to keep their

word. While this is also important for personal relationships, friends and loved ones tend to be more forgiving.

4. **Reliability:** This means being on time, being prepared, taking responsibility. You have some leeway in *personal relationships*, little in *business relationships*.

5. **Emotional Support:** *Business associates* are less apt to make allowances for your personal problems; especially if they interfere with the products or service you provide. If you don't keep up your end of the value exchange, the relationship is over. However, if you find a way to maintain excellent service through a personal crisis, you should expect support from business associates. Sharing some elements of your personal life is a good thing, especially elements that you have in common. If you think you're about to share too much, stop yourself. If you already have, let it go. Don't apologize or over-explain.

6. **Loyalty:** Friends and business associates can both be loyal, but with business associates, there is less certainty—and more conditions. Loyal associates will pay a little more for your products and services than they would pay to competitors, but not much. If a competitor approaches your client with a better deal, a truly loyal client invites you to match the offer.

Developing long-term relationships with clients is simple: maintain an even value exchange; don't cross boundaries; keep your word; be on time; keep your personal problems to yourself; and know the limits of loyalty. **SSE**

*Jean Van Rensselar is owner of Smart PR Communications. Email [Jean@SmartPRCommunications.com](mailto:Jean@SmartPRCommunications.com).*

**ACTION: Build strong business relationships.**

# 2013 Leadership Excellence Memberships



## Leadership Excellence - Digital Edition Organizational Leadership Development

- 1 - Year \$99
- 2 - Year \$179

Recent contributors include: Marshall Goldsmith, Tom Peters, Anne Mulcahy, Warren Bennis, Margaret Wheatley, Patrick Lencioni, Peter Bock, and many others!

"Leadership Excellence is an exceptional way to learn and then apply the best and latest ideas in the field of leadership."  
—WARREN BENNIS, USC PROFESSOR OF MANAGEMENT



## Personal Excellence - Digital Edition Personal/Professional/Self-Leadership

- 1 - Year \$60
- 2 - Year \$99

Recent contributors include: Wayne Dyer, Andy Andrews, Seth Godin, Dan Goleman, Marianne Williamson, Bob Davies, Tim Sanders, Alan Cohen and many others!

"Personal Excellence is the only reading you'll need to do for continual self-improvement both personally and professionally!"  
—SHARLENE HAWKES, FORMER MISS AMERICA, ESPN BROADCASTER



## Sales & Service Excellence - Digital Edition Sales/Service Team Leadership

- 1 - Year \$60
- 2 - Year \$99

Recent contributors include: Tom Hopkins, Chip Bell, Ellen McDargh, Zig Ziglar, Kevin and Jackie Freiberg, T. Scott Gross, Brian Tracy, Patricia Fripp, and many others!

"Sales and Service Excellence is a phenomenal resource for sales professionals who want to grow and achieve more in their careers."  
—TOM HOPKINS, AMERICA'S #1 SALES TRAINER

## New: Online Access

Full Online Access to our 30th Anniversary  
Instant Consultant & Leadership  
Development Training Modules

- 1 - Year \$129



**Get Started  
Today!**

Fax this form to: 801-377-5960, Call: 1-877-250-1983  
Email: Sean.Beck@LeaderExcel.com  
Order Online: [www.leadership-excellence-store.biz](http://www.leadership-excellence-store.biz)

## 2013 Excellence Memberships

### Option A: All 3 Journals (Individual)

Leadership Excellence Digital (12 issues)  
Personal Excellence Digital (12 issues)  
Sales & Service Excellence Digital (12 issues)

- 1 Yr: \$99     2 Yr: \$179

### Option B: Excellence Advantage (Individual)

Leadership Excellence Digital (12 issues)  
Personal Excellence Digital (12 issues)  
Sales & Service Excellence Digital (12 issues)  
Unlimited Access - Online Instant Consultant  
Leadership Excellence Honors Society Certificate

- 1 Yr: \$199     2 Yr: \$359

### Option C: Team Advantage (Group)

Leadership Excellence Digital (12 issues)  
Personal Excellence Digital (12 issues)  
Sales & Service Excellence Digital (12 issues)  
Unlimited Access - Online Instant Consultant  
Leadership Excellence Honors Society Certificate

- 1 Yr (3 - 9 Users) \$599
- 1 Yr (10 -49 Users) \$999

**Call for more information.**

## Please Start My Membership!

Please sign me up for the item(s) checked.

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

- Visa     MC     Amex     Bill me

# \_\_\_\_\_ exp. \_\_\_\_\_

Signature \_\_\_\_\_

Call 1-877-250-1983 for multi-user discounts.