

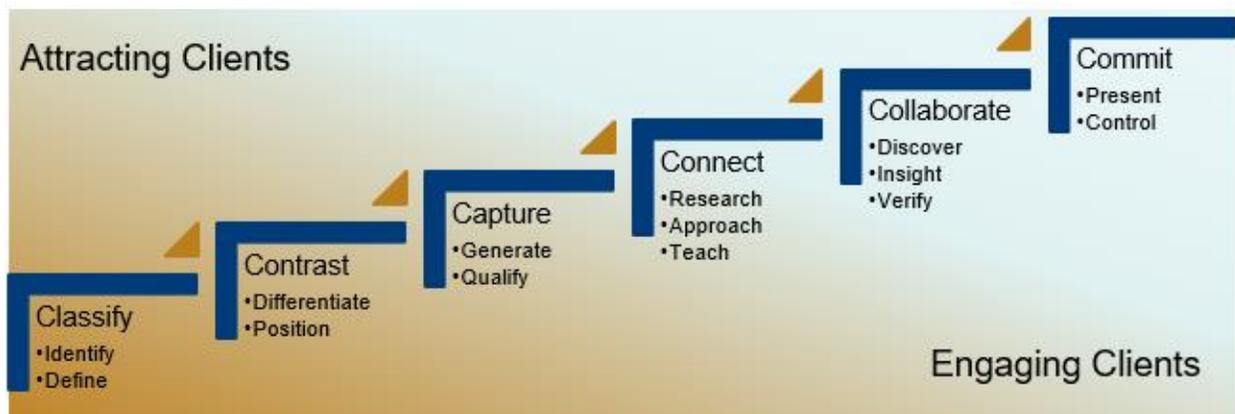
## 6 Critical Steps to Client Creation

We get it. Our clients commonly cite Marketing and Sales as one of their biggest challenges. They'd rather focus on solving the technical problem. For most, marketing is a complete afterthought, and sales is uncomfortable. Nevertheless, everyone wants more leads to grow business. In Daniel Pink's book, *To Sell is Human*, he offers this perspective:

*The ability to move others to exchange what they have for what we have is crucial to our survival and our happiness. It has helped our species evolve, lifted our living standards, and enhanced our daily lives.*

So, perhaps, we could change our perspective on marketing and selling. What would it look like if it was easy? It might occur like we were simply sharing expertise with people who need help solving a problem or to improve their results. If we could adopt this perspective, it's not really traditional marketing and selling, but rather Client Creation – the art of attracting and acquiring the clients you want.

Based on our experience of successful, growth-oriented integrators, there are six critical steps for client creation. These six steps span the process from identify and attracting clients through engaging them and getting their commitment to do business with you. Typically, the first 3 are more 'marketing' and the last 3 more 'sales', but it is more of a continuous effort rather than marketing acquiring a lead and throwing it over the wall to sales.



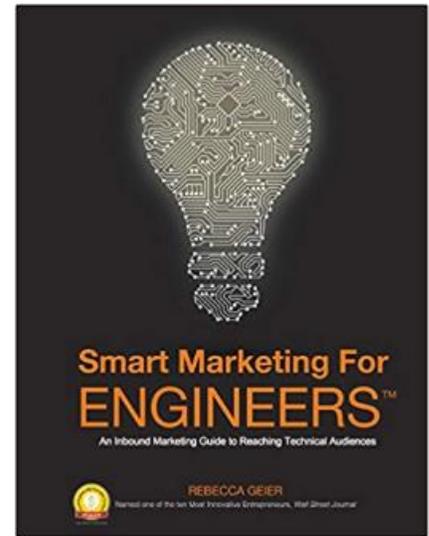
### Step 1 – Classifying Your Customers

You begin by classifying your customers. That is segmenting your potential customers into target markets. Then, you can define the 'personas' within that market. The old adage that "you can't be everything to everybody" certainly applies. So, the better you understand your potential clients, the better your marketing to them. When segmenting you potential clients

into groups, be sure to ask yourself, do your clients self-identify with how you are grouping them? And, have you defined them by **their** market not, yours?

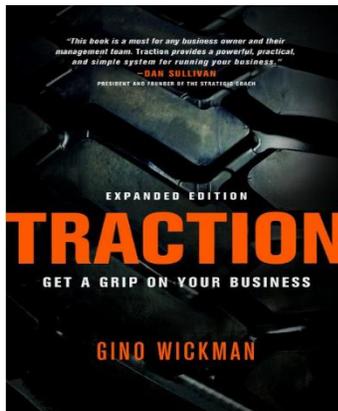
Once, you've identified your clients by segment, then define their personas. This is essential to your client creation efforts, so don't dismiss it as a waste of time. It's not just marketing speak, but, absolutely critical in your ability to develop targeted content ... in their language so they truly get it.

Check out *Smart Marketing for Engineers*, written by our friends from [TREW Marketing](#) which has some excellent guidance for defining personas.



## Step 2 – Contrast Yourself

OK, now that we've classified our customers, the next step is Contrast yourself. That is, how do you differentiate and position yourself to these clients. In Geno Wickman's book, *Traction*, he asks what are your three 'uniques.' Putting it plainly, what makes you different? What makes you stand out and is recognized by clients. He notes you might all share one of these uniques, maybe even two, but no one else should have the three you do. He also recommends the following sanity checks:



Is it important to the customer?

Is it difficult to copy?

Is it sustainable?

After you've defined your differentiation, you can go to work on your positioning and your brand to position your company in truly unique ways that you can constantly reinforce during client interactions.

## Step 3 – Capture Your Clients

Once you've classified your potential clients and determined how you will contrast yourself, then you are ready to capture their attention and convert them to leads.

Let's start with Outbound Marketing. That is proactively reaching out to an identifiable market. This is often considered 'traditional marketing' and tends to get a bad wrap in this digital marketing age, but the techniques still have their place as part of your overall strategy.

- 1) Using publications – that your respective audience relies on for information can provide opportunities to demonstrate your expertise.



# Business Acumen Brief

- 2) Events – that your prospects attend to collect and share information. We encourage you to think ‘outside’ of the booth. Take full advantage of conferences activities (e.g. sessions, papers). Also be proactive in your client activities to make it ‘your’ show.
- 3) Networking – Participate in industry associations and standard bodies in which your potential clients share information and even influence their buying decisions.
- 4) Social media – Use forums such as LinkedIn, not just to promote what your company is doing, but to research and proactively identify clients.

Now, let’s turn our attention to inbound marketing, which has become synonymous with the Web. 80% of businesspeople start their research on-line. It is even higher in most technical areas. So, don’t be weak in this area. It should be the focal point of your marketing. You need a long-range perspective. Rome wasn’t built in a day. It takes time to develop content and it’s hard to tie it to revenue. And, it’s not a project it’s a journey.

Almost invariably, web marketers will tell you that it is all about content. It is not simply a fancy home page, but the compelling and differentiated content that will create and drive traffic to your site. Your messaging and content should focus on your customer – their needs and the benefits that you offer, rather than your technical know-how. Refer back to our discussion on positioning statement. And, make sure that your web site integrates well with your marketing activities. For your key campaign(s), you should create specific landing pages that engage visitors with relevant information.

## Step 4 – Connecting with the Client

The sales engagement process begins with that first customer contact after the lead is generated. During this step, successful integrators will:

- Do their research
- Use a consistent approach
- Teach the client something to establish credibility.

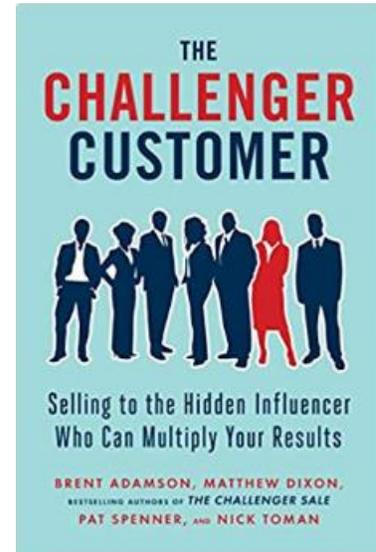
To prepare for your customer engagement, gather information about the prospect. Then, you can formulate educated questions and observations about the customer and the opportunity. Next, consider what is your approach and your intended outcome of the engagement. Is it to qualify the opportunity? Some just want to make it to the next meeting. Others intentionally create an action item (for the customer) to validate their desire to move forward.

Finally, the best sellers also have an intent to inform the customer. Of course, it is important to listen to the customer and seek first to understand. But, you should have a ‘teaching’ goal to point out new needs or challenges for their business, why changes are necessary now and how you can uniquely solve their problem.

## Step 5 – Collaborate with your Client

After establishing a solid connection with the client, the next step is to ‘Collaborate’ with them on the solution. System integrators are often adept at gathering the technical requirements, but you also gain the ‘commercial insight’ regarding their business drivers, decision-makers, and their consensus process.

In the book, *Challenger Customer*, the authors assert that business solution decisions are made by a consensus ... involving 5.4 people on average. And, that the conventional wisdom of seeking out and convince every person is inefficient and time consuming. Instead, *Challenger Customer* suggests there are these personalities within the customer organization, not according to their roles (or positions). So, you must identify the ‘mobilier’ who will gain consensus.



## Step 6 – Commitment from the Client

The final step in the process is gaining the client’s commitment. Successful companies often recommend several options including their competitor ... even the client solving the problem themselves or doing nothing at all. Doing so gives you the opportunity to position pros/cons. You may also want to consider presenting options for your solution. Ultimately to close the sale, the customer must ...

- Commit to change
  - Financial results > solution costs
  - Problem ranks higher than others
  - Path is clear
  - Risks are reasonable
- Commit to you
  - Your approach is best option
  - Your company is capable
  - Your company delivers on commitment

## Parting Thoughts

Throughout the client creation process, the focus should be on the CUSTOMER, not YOU. Classifying your clients and defining their personas will improve your ability to contrast yourself from the competition and capture your client’s attention. Just as importantly, when connecting with the client, you must connect and collaborate with them to understand their needs and gain the commercial insight necessary to gain their commitment.