InGenius 15-Minute Uptakes

Area: Practice Development
Learners: Partners and managers
Time: About 15 minutes
Topic: Effective Prospect Meetings

- **Setting the Stage**
- Building Rapport
- Critical Questions
- Following up

Instructor notes

Introduction to your group

"We have four 15-minute Ingenius Uptakes about having great prospect meetings. Ingenuity Marketing Group in Minnesota "secret shopped" 10 law firms and even more CPA firms to find out how well professionals do when meeting with potential clients. They found out there are certain specific things you can do to improve you chances of turning a prospect into a client. The first 15 minute uptake is on **Setting the Stage for the Prospect Meeting."**

Lecture to your group

"Imagine a morning when you get out of bed late because your alarm did not go off. There is no milk for cereal. You go to start your car and someone has bumped into it during the night, leaving an obvious dent. On the way to work the traffic is terrible. Running quite late, you find someone has illegally parked in your parking stall and you have to park blocks away. Your usual coffee shop has a very long line. You come into work almost 30 minutes late and your first meeting started 15 minutes ago."

"Even though not one of these things will ruin your life, how do you feel when you walk into the meeting? Are you more or less receptive to whoever is speaking than you normally would be? Our first 15-minute uptake is on setting the stage for prospect meetings. While having a system for setting up prospect meetings well will not guarantee a new client every time, allowing your prospect to have a mediocre experience makes it much harder for you to be successful."

"All of the touches a prospect has with our firm add up to whether they are more or less interested and open to our message. I am going to divide us up into four small groups and each group will have a different assignment. I am going to give you each the same case study but a different question to answer."

Case Study
(We recommend you hand this page out to your learners)

Last year Susan took over her family company from her grandfather, who had died suddenly. Susan had worked in the sales and marketing end of the business for five years and was well regarded as a potential leader. She had tripled the company sales and knows she can make it as a market leader but does not have a lot of operational knowledge. She is dismayed to find that her grandfather's management systems are out of date and she does not think either his attorney or his CPA is up to the job of helping her improve the overall health of the company. She knows a lot of marketing people but not many CPAs or attorneys. She is looking for new advisors and wondering how to find and choose them.

The four small group questions are: (we have five in case you do not have Internet access to answer the question about the website). Each small group should answer a different question.

If Susan's friend said our firm was a good fit for her, but he did not know any of us personally and did not write down the firm name, what do you think Susan would do? How easy is it to find us in the phone book? On the Internet? In trade associations?

If Susan called our receptionist asking for general help with her business, how do you think the call would go? What does our receptionist need to know to direct her to the right person in the firm? Does the receptionist have this information?

If Susan showed up in our reception area 10 minutes early, what would be her impression overall? What could give her a lesser impression? What would stand out as terrific?

If Susan went to our website, how easy would it be for her to decide if our firm could help her and who would she most likely call or email? Is our website helpful to her?

If Susan came into our firm, what would be her overall impression of our staff?

(Give each team 5 minutes and then "debrief" by asking them to tell you their answers. Lead a general discussion about the answers. Ask one large group question:)

"What are the most important things we can do to "set the stage" so that prospects find us easy to buy from?"

Wrap-up Lecture
"We only have the one chance to make a great first impression that sets people up to be open to our message of high quality client service. People really do judge a book by its cover – ask any book sales department! We have to constantly assess our first impression and make sure it always reflects the kind of firm we are."

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(One of the things you can use to demonstrate rapport building is a tennis ball. You can throw it to one participant who has to say something of a general nature. They can then throw it to another who has to answer and add something else. This demonstrates the energy of rapport.)

Introduction

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Lecture

"When you first meet a new person, one of the instant things human beings do is to automatically assess the differences and similarities between themselves and the new person. Building rapport is a way of increasing similarities and decreasing differences, resulting in a more relaxed and connected prospect. When you build rapport you will find your prospect more open to your questions and more willing to consider your ideas."

"Building rapport usually happens right after the introductions in a meeting. It is NOT about a serious discussion of business – it tends to be light or somewhat personal in nature. We find that rapport building starts in the context of body language and hospitality. **What are some of the things we can do to make a guest more comfortable at the firm?"**

(Make sure they point out more than getting coffee. What are host behaviors? Include smiling, eye contact, making sure the guest has a comfortable chair not facing the sun, etc.).

"Some of us are easy and natural at building rapport and others find it difficult. Let's break some topics of conversation down into a rhythm that many experts use naturally with the ladder of questions."

"Step One questions or observations are quite general and congenial in nature. They may include something like, "It is pouring rain outside," or "Did you have any trouble finding our building?" They are neutral energy and not provocative but they start the give and take of a conversation."

“Step Two questions or observations are a bit more personal or deep in nature. They might include, “Are the children in the photos yours?” or “How long have you been an attorney? What do you like about your work?” “I have heard so much about your company. I am glad to see it in person.” This level of questions has more energy and usually elicits more than a polite response.”

(Facilitator: let them talk for 4 minutes and then ask them to share and write some of the better items on the whiteboard or poster. Exercise: Assign groups randomly to come up with 3 questions or observations for each of the categories below. Assign no more than 4 people per group but more than one group may work on the same assignment. Always be sure to ask each small group for a report-out to the large group so everyone can gain the value of the discussion.)

Group assignments
At the firm, step one questions or observations
At the firm, step two questions or observations

At the prospect’s location, step one observations or questions
At the prospect’s location, step two observations or questions

Wrap-up
“While some of us may think rapport is “fluff,” it is difficult to gain a toehold of trust without it. Step Three questions, which Ingenuity calls Critical Questions, we will go over in the next 15 minute Uptake.”

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"We have four 15-minute Ingenius Uptakes about having great prospect meetings. Ingenuity Marketing Group in Minnesota "secret shopped" 10 law firms and 13 CPA firms to find out how well professionals do when meeting with potential clients. They found out there are certain specific things you can do to improve you chances of turning a prospect into a client. The third 15 minute Uptake is about asking critical questions."

Lecture

"By asking critical questions we mean questions that are critical to the mission of the business, organization or individual you are talking to and critical to our ability to write a proposal to follow up to the meeting. This third Uptake assumes that you have built rapport with the prospect and that you have a great connection. Some people take 5 minutes to build rapport and some take longer, but you do not move into critical questions until you feel that give and take of connection."

"One mistake many of us make is just asking questions about the business in general. While general questions are important, if you do not address the concerns that will set your proposal apart, your meeting may be wasted."

"Here are some types of concerns you need to uncover:

Personal concerns: What does the individual you are talking to need? What are their fears or hopes for their position and for their company?

Service concerns: Discern what types of service they are looking for. Why are they considering switching providers (if they cannot articulate this they may be price shopping only). Find out what matters to them.

Expertise concerns: Find out what types of expertise you must demonstrate you have. Ask them what their previous provider did not have in terms of expertise. Ask them what they want you to know.

Relationship concerns: Find out if it will be difficult leaving their previous provider and if you can help with that transition. Ask if you can make it easier.

Financial concerns: Ask about budget and payment. Find out if you can meet their expectations.

Logistical concerns: Do they have any concerns about your ability to be on-site or get things done? Determine the scope of the project, who it will involve?

Proposal details and timing: Find out when they are making a decision and what they expect in terms of a proposal. Get the details for follow up.

Decision making concerns: Who is the decision-maker and when will the decision be made? Express your desire to work with them.

Future making concerns: Ask what they want to create if everything goes well. Ask about the strategic goals of their organizations. What will they do if you help them save money or streamline their process? Help them build a future."

(Break up the group into groups of 2-3 people. Assign each group 1 or 2 areas of concern and have them write down exact questions or phrases they would use to find out more in this area. Be sure to ask each small group to present what they came up with to the whole group.)

Wrap-up

"If you leave the meeting without enough information to write a strongly defined proposal, you are probably lacking the critical questions skills. Of all the parts of meeting with prospects, this is the most important. You have to get past your reluctance to ask questions like "Why are you considering a change?" so that you can uncover the real issues of the prospect. In our last 15-minute Uptake, we will talk about the all important skill of following up."

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Lecture
"According to Ingenuity's research, following up is the least used tactic to acquire new clients. Only three of all the people they spoke with followed up in any way. If a prospect is taking the time to contact you, they are REALLY in need of the service. Any form of follow-up helps."

"Research says that once a decision is made to choose a new provider there are often bumps in the road – so often that almost one third of people go back to the original firm or switch again. Losing gracefully is a key opportunity."

"There are several forms of following up a good prospect meeting. The first happens right in the meeting. Ingenuity found most people simply shook their hands and thanked them for coming. So the first form of follow up occurs right in the meeting: Ask them for the business and find out the next steps."

"The second type of follow up occurs immediately after the meeting. This is usually a note or email.

The best type of follow up is to follow through. It is not only a graceful loser but ways to keep connected to the prospect."

(Put the participants in three groups. Assign each group 1 of the 3 forms of follow up. Then ask them to come up with the following for their assigned topic.)

Assigned topics

What would you do if:

- The prospect really was not a good fit for your firm.
- The prospect was an ok fit for your firm.
- The prospect turned out to be a PERFECT client for you.

(Have each group make a presentation. You might also want to bring in some of the natural firm follow up information – newsletters or other mailing lists so they can see the forms of follow-up already created.)

Wrap-up

"Leaving with a handshake and a "nice to have met you," is not a strong way to assure your prospects you want to work with them. According to Ingenuity's research, many professionals are missing this key step. Take the lead! Leverage your investment of time in the prospect by following up and following through."