CLOSING WITH CHARM

Closing With Charm

You've done it. You've got a response. Or a lead, of some kind. It matters not where it came from. What matters is you capitalise on this situation - and close the deal.

I've always instinctively focused on being trustworthy - and showing this by being forthrightly honest with prospects.

On top of that, I demonstrate my knowledge and deliver my recommendations or ideas with enthusiasm.

This process is something I was taught in my days working at London agencies - and then honed when I ran own agency.

When we started doing bigger, more creative projects such as content marketing campaigns, we would offer a free brainstorm in place of a technical audit.

I've added two unannounced bonus sections to this ebook:

A) The full process for how we won our biggest ever client (based on our fees), Symantec.

B) A succinct guide to the "Do's and Don'ts" of sales calls.

I couldn't resist. I always want to overdeliver. This ebook is no different.

I hope you enjoy it - and I hope you implement the advice.

Thank you,

Jon

Prescriptive Step-By-Step Guide To Closing With Charm

I’m going to lay out the process I used to close deals. This is me on my best day. Often, with so many leads (thanks drunk cold email!), I didn’t stick to it 100%. You should do your best to stick to it, especially when just starting out. You can always amend it and make it your own later, after you’ve had some successes.

1. Send charming cold emails / direct mail / LinkedIn messages

2. Do a happy dance whenever a positive response arrives in your inbox.

3. Reply to the email - and book in an initial ‘information gathering / rapport-building’ call (or a meeting if it’s local and you prefer face-to-face interactions.)

The reply will depend on where the lead is from - and the words in their message. For instance, if you get a reply from a charming cold pitch that reads something gushing like:

> Dear Jon
>
> Firstly let me congratulate you on the most entertaining cold call/email that I have received recently, or possible ever. And I get a lot. It’s so rare to get a truly creative communication from an agency that purports to be creative, so thank you. I’m going to build a Wall of Fame for examples of good marketing, on the basis of your letter. It might be quite a small wall though, or perhaps just a few tiles.
>
> Let’s talk? We can probably use some help with value propositions, or just our general thinking. You don’t need to wear the top hat, but if it helps, don’t let us stop you.

My response would be something simple & straightforward like:

"Thank you for the kind words, Jessica. Much appreciated. :-)
I'd love to talk.

You can either use my scheduling link, https://calendly.com/charmoffensive, or let me know some dates and times that work for you.

Have an absolutely wonderful day,

Jon"

If this lead is a referral or inbound lead, and doesn't contain the inherent positive gushiness of a charming cold pitch reply, you can say something like:

"Thanks for getting in touch, Rachel.

I'd love to chat further. :-)

You can either use my scheduling link, https://calendly.com/charmoffensive, or let me know some dates and times that work for you.

Have an absolutely wonderful day,

Jon"

4. Prepare for the Call.

No matter what your offering is, you should take a look at their website, their company history, their team; everything you can find.

Be sure you look up your key contact (the person who replied to your cold pitch or sent you an inbound enquiry) on LinkedIn.

If your contact suggests other members of her team / company will be joining the call, try and have a look at their profiles too.

The next piece of preparation changes dependent on what you're pitching.

If it's social media consultancy, of course you should review their social profiles.

If it's SEO, you should do a quick audit of their on-site SEO, link profile, and visibility in Google for assumed search terms.

If it's direct response copywriting, review their sales copy.

Make a note of all the elements you believe can be improved.

5. The First 'Information Gathering' Call

This **<u>isn't</u>** the pitch!

The first call is to gather information and perhaps build a little rapport with the prospect(s).

Let's go through the call step by step.

You dial their number - or join the Zoom meeting - or call them on Skype.

Hopefully, this part works.

However, sometimes it doesn't. Sometimes the client cancels at the last minute, or worse, says nothing and then doesn't show up.

Wait 10 or so minutes and then send a quick email.

"Hey Rachel,

Are you still ok for our call today?

If not, happy to reschedule. Just say the word :-)

Let me know.

Cheers,

Jon"

Usually, folks will show up and on time. Maybe a few minutes late - but hey, they're the prospect, they have the money, so they can get away with such tardiness. You can't! Always be on time.

The first thing you should say is:

"Thanks for your time today, Rachel.

One of us has to go first. Would you like to introduce yourself and {company name}? Or shall I go first?"

Often they will introduce themselves first. Sometimes they'll ask you to. It doesn't really make any difference.

When introducing yourself, keep it succinct.

Don't waffle on with your whole life story…

Do it in 45 seconds or less. You can always give more detail later. But you can't retroactively remove your waffling!

When your prospect introduces themselves and their company, listen and make notes. Try to make them legible!

You might not need ALL the information your prospect is mentioning - but it looks good if you can recall this stuff at a later date.

When both introductions have been done, it's time to start asking questions.

Say something like: *"May I ask a few questions relating to your {social media marketing / SEO / sales copy / user experience design / whatever it is you want to sell them}?"*

I've never had anyone say "no" to this question. If they do, it's probably not a lead worth dealing with. :D

Then you ask the questions you need to understand the prospect's current situation.

Here are some example questions.

These are questions I used to ask - as I offered a digital marketing services. You can amend these based on your offering.

- What digital marketing activity have you been doing up to now?
- What are your goals for your digital marketing activity this year?
- What are your key performance indicators?
- Who are your top competitors? How is their digital marketing activity?
- Have you worked with any other digital marketing agencies / freelancers?
- Who takes care of your PR / PPC / Social Media / Email marketing?
- Do these teams work together at all?
- Who are your customers? How do you currently find them?

Write down their responses.

You need your pitch to fit in with their limitations and ambitions.

If you're using Zoom, you can record the call. However, be sure to ask permission before doing this. (Out of politeness, and in some jurisdictions, legality.)

When you've asked all the questions you need, you should say:

"Thank you, Rachel. This has been incredibly useful.

Would you mind if I did a quick audit of your {YOUR-DISCIPLINE} activity? I'll put together some recommendations and ideas that you're free to steal, even if we never speak again."

Generally, prospects will agree to this.

If they don't, it's probably not a great lead…

When they agree, ask: "*Can we book in some time now to run through my analysis and recommendations? I promise, it'll take no more than 20-minutes."*

Finish the call by asking *"Do you have any questions for me?"*

Any questions at this stage will likely be general.

They'll ask about your background, experience, how long you've been freelance / ran your business, and other stuff.

Stuff you should easily be able to answer.

6. Prepare the Audit

Think about the key factors of your discipline.

For SEO, this will be on-page SEO (and there's many variables there), how many links they have, and the quality of those links.

For social media, it'll be their following, engagement, content, and consumer sentiment.

For sales copy, it'll be the quality of their landing pages, opt-in pages, sales pages, emails, and how well they all convert. This can then be segmented further: how are their headlines, bullet points, and use of persuasive principles?

Create a one page template in Google Drive - just a simple spreadsheet or document.

List each element you are going to review.

Give each element a simple 1-10 score with 1 being 'Needs significant improvement' and 10 being 'Perfect. No changes needed."

And then for each element, give a brief summary of why they received that score, and what could be done to improve their score in this area.

Be honest and fair in your appraisal. If they're doing something well, definitely mention it and use it as a compliment.

The prospect might expect you to completely rip their current efforts apart. They know the free audit is a device for you to be able to show where you can help them in exchange for money.

Instead, surprise them with your fairness.

This will give your overall audit more credibility.

It’s a little like when you see something with 100% 5* reviews. You might suspect shenanigans are afoot. But add a few negative reviews in, and it seems more realistic.

People are more likely to trust a 4.7/5 score than a 5/5 score.

The same is true here.

Also, for the most part, it’s not enjoyable to spend 20 minutes mercilessly trashing someone. It’s nice to have some positive things to say.

Additionally, your prospect (or their colleagues) may have enough knowledge to know if you’re not telling the full story, or being unnecessarily negative for the purposes of winning a deal.

The solution, as ever, is to be honest.

If a prospect’s current efforts are without any positives, at least do your best to deliver this information with tact. Something like:

“Alas, not the best news, I know.

But on the bright side, this means there are huge opportunities for {PROSPECT-BRAND-NAME}.”

Once you’ve finished the audit, write a brief (half page, 1 page maximum) summary that details all the elements that can be improved, and the benefits such improvements will bring.

“With some simple changes to your title tags, you could quickly rank for a range of search terms relevant to {PROSPECT-BRAND-NAME}. This will lead to increased targeted traffic and sales.”

In the world of digital marketing, the main benefit is usually increased traffic and conversions. It makes for a far easier sale if you can bring things back to the prospect making more money.

Of course, not everyone is offering digital marketing, so your key benefit may differ.

When complete, send it to your prospect, in an email like this:

“Hey Rachel,

I’ve attached your {Social Media Marketing Audit} document.

I promise, it’ll be the most exciting audit document you’ve read all day! :D

I’m looking forward to our call on Wednesday at 4pm EST.

Have an absolutely wonderful day,

Jon.”

For more creative offerings, instead of offering an audit, you can offer to ‘brainstorm ideas’ for the prospect.

This is what we did when pitching to Symantec. I’ve included the full process we used to win Symantec later in this ebook. :-)

7. The “Running Through Your Recommendations” Call

Get the call started and say something like:

“Hey Rachel. How’s it going?”

They will reply with something like:

“I’m not doing bad for a Monday, Jon. How are you?”

To which you say:

“I’m great too thanks. Shall I get right to it?”

They will agree - and you can go through your audit / brainstormed ideas.

When you’ve gone through it, ask:

“I hope that was useful! Did that make sense? Do you have any questions?”

Once you’ve answered their questions, should they have any, you should ask if you can put a proposal together for them.

“May I put together a proposal on how we could implement these recommendations?”

Simple.

8. Create the Proposal

You need to put together a costed proposal.

This needs to include:

- The work you’re going to do.
- The timeframe in which you are going to do it.
- The expected results of the work.
- What it’s going to cost.

9. Send it.

Send the proposal, alongside an email that says something like:

“Rachel,

I’ve attached your proposal.

I’d love to hear your thoughts.

When would be the best time to follow up with you regarding this?

We’d love the opportunity to work with you. :-)

Cheers,

Jon”

10. Follow Up.

Use this email to follow up with prospects who you’ve sent a proposal to, but they’ve not replied yet.

*“Subject: ✉ *ahem**

Greetings {first name},

I’ve managed to resist the urge to pester you about the proposal I sent last week. I’ve tidied my desk, got to inbox zero, and even done some admin work I’ve been putting off for an impressive amount of time.

I’m sorry to inform you that I can resist the urge no more…

Here goes… Did you manage to take a look at the proposal?

If so, what did you think?

If not, when would it be best to send you another pestering email? I don’t wish to take up any more space in your inbox than I need. :)

I hope you don’t mind my professional perseverance.

Thanks so much for this opportunity.

Fingers crossed,

{your name}
{your email signature}

P.S. Please find this picture of me appearing to plead with you to reply to me. I didn’t want it to to have to come to this. You forced my hand - haha!

{insert picture of you looking at the camera, smiling sheepishly}”

11. How Often to Follow Up

This really comes down to what you’re comfortable with. Try not to be toooo pushy, as this turns people off.

I used to follow up once a week.

Often people are just too busy to reply, or have other things on their minds - such as new business they’ve got coming in which will allow them to pull the trigger on your project.

12. If You DON'T Win It :(

Don't be disheartened.

Ask for feedback. Use it in your next pitches.

If it's a case of "we don't have the budget to cover your fees right now" or "it's just not the right time for us, we have other priorities" ask if you can email them again in 3 - 6 month's time. Then you might get a second shot.

And also ask if you can connect with them on LinkedIn and keep in touch.

Months, or sometimes even years, later you might hear from them again asking you to pitch on a new project - or even for the company they've since moved to. This has happened for me many times.

13. If You DO Win It, Do a Happy Dance, and Send Them an Email to Thank Them and Commence the Project.

Here is such an email:

"Thank you so much, Rachel! This is excellent news :-)

Once I've finished doing my happy dance, I'll send a further email to begin the project containing some key questions, deadlines - all the important stuff.

Let's book in a call to run through our plans?

Let me know,

Jon"

Charming Sales Tactics

How to Use your Nerves as a Persuasive Weapon

Even with full preparation, you might still feel nervous before a sales call or meeting. Because there are stakes. If this goes well, hurrah! You get more work - and the money that goes with it.

And the chance to do a good job and get a testimonial or case study - which you can use to win more business in the future…

As long as you can demonstrate competence, it's ok to be a little nervous on sales calls.

You can even say:

"I'm great at what I do but I'm no salesperson. So forgive me if my pitch isn't slick or perfect. But I promise, the content is good, and I'm excited about it."

Or if it's with a DREAM client of some kind:

"Ok. I won't lie. I'm a little bit nervous. This is a big deal for me. I've wanted to work with {your-brand} for a long time now. So forgive me if my pitch isn't slick or perfect. But I promise, the content is good, and I'm excited about it."

However, you must demonstrate you know what you're talking about.

You need to know your offering and have your pitch down. You need to be the expert. You need to show competence.

Without this, your nerves could be seen to exist because you don't appear confident about your discipline.

That’s different to being nervous because you’re not a salesperson or are excited about the opportunity you have been given.

It’s ok to say *“Thank you for this opportunity”* too.

Sound Like You’re Excited and Eager rather than Desperate and in a Hurry (Even if You Are!)

There’s a difference between professional perseverance and being an annoying nag.

Don’t pester someone every day asking if they’ve read your proposal.

Unless something in your proposal is extremely time sensitive, following up once a week is fine.

Be polite and enthusiastic in your follow-ups.

“Rachel,

I’m afraid it’s another email from me :D

Did you get a chance to look at that proposal yet?

I promise not to pester you for another week - or until you tell me when is best.

I hope you don’t mind my professional perseverance. :)

Cheers,

Jon”

Talk about Your Proposed Campaign in a Way that Signals Unity between You and the Prospect's Company

I wouldn't do this too early in the process, but in a final pitch, you can phrase things as using "we".

"We will have to make sure we book in a monthly catch up call, where we run through the activity this month, our results, and what we have planned for the following month."

This speaks in a way that talks about you and the client as one team, on the same side. Rather than the prospect and the supplier.

Ask the Right Questions

Prospects love to talk about themselves - let them.

Use these questions to extract the information you need to put together an ideal pitch.

Remember: If the client is talking, you can't say anything stupid.

You know your business and offering much better than me, so you should have a good idea of the key questions you need to ask to extract the info you need.

You'll learn over time better ways to phrase these questions, and new questions to ask, as you do more pitches with different people.

Make a note of them all, and refer to it often.

Respond to Common Questions from Prospects about Price, Timeframes, Your Experience, Your Results, and Methodologies

I'm going to provide my own answers to these questions.

<u>Do you send a lot of these emails out?</u>

"I won't lie and say you're the only person I've sent an email to. I've sent a few - and the response has been great so far."

<u>What experience do you have?</u>

"I never went to college or university. I started a business when I left school. And then I moved down to London in 2006 and worked at digital marketing agencies for 5 years working with a broad range of clients like UKTV, Kickers, X, Y, and Z.

I was usually a senior SEO consultant, but later started I-Spy Marketing's social media department.

You can take a look at my LinkedIn Recommendations if you'd like to see the testimony of my past clients and colleagues that I've curated throughout the years."

<u>Have you worked with clients in the [fashion / luxury / some other niche] sector before?</u>

If the answer to this is 'yes', I'd say that, and then detail my experience.

If my answer was 'no', I'd say something like:

"Not specifically, no. We've worked with clients in a huge range of sectors - everything from fancy dress costumes to providers of enterprise cyber-security.

Our breadth of experience is an advantage. Our skills can be translated to any niche.

We bring our expertise in digital marketing, and you bring your knowledge of your company & market. It's the perfect team."

There's also questions they may be asked that you can't honestly answer yet. I've provided some ways to respond to these.

<u>How long will it take to achieve results?</u>

"This depends on your current circumstances, your budget, and your specific goals. We will be able to get you some broad predictions over on email once we've looked at it all properly."

<u>How much do you charge?</u>

"We're not the cheapest in the market. We're not the most expensive. All of our proposals are bespoke to each client. We have clients on £2k per month and clients on £10k per month. It all depends on the client."

<u>Why will this work?</u>

"We have case studies which show a proven process. Take a look at our Symantec example. Their brief to us was to become known for their expertise in the 'BYOD' market. We achieved this.

Let's go through the case study…."

Then you proceed to go through your case study, showing the results you achieved and the process used to achieve them.

Then talk about how you will use the same process for the prospect you are pitching to.

Price Your Services in a Way that's Profitable for You and Offers Value to the Prospect

I had worked at digital marketing agencies in London for 5+ years before starting my own agency, while Gary had worked in-house at a $billion multinational.

I'd been writing proposals for years - and Gary had been on the receiving end of proposals and pitches (although, not from me personally! - that would've been weird!!)

We knew how much agencies and freelancers charged for SEO and Digital Marketing services.

As with anything, there's a range.

There are providers at every price level: from the cheapest outsourced providers on Fiverr - to the biggest agencies on the planet.

The agencies I worked at in London all had a day rate of around £1k.

Having this in mind, knowing what other providers are charging helped a lot.

Even between big agencies, there is no uniformity in pricing or levels of service.

There are no rules.

The only price tag that matters is the one clients are willing to pay.

And yep, that means we regularly charged big corporations way more money than we did for small mom & pop stores - for the same work.

To be fair, we could, and still can, justify this.

Big corporations and their bloated bureaucracies were often a pain to deal with. You could call it price discrimination. We called it “asshole tax”. :D

My advice - find out what a range of providers in your sector charge. Find the range. Just so you know it.

Then you decide what you’re happy to be paid. If you have a team, an office, and other fixed costs, you need to ensure your pricing enables these overheads to be covered.

We would often offer tiered pricing, with names for packages like Gold, Silver, and Bronze.

This meant my spread of pricing was more frequently in my client’s own ‘ballpark’ of acceptable pricing. Then we negotiated from there.

And one behavioural economics “nudge” that works really well with this model is to set a base price - the slightly-more-than-minimum you’re prepared to accept which gives you decent profit and hopefully offers the minimum results or outcomes the prospect wants to achieve.

Then set the middle, “Silver”, price - this is the price and profit you really want to make, and covers pretty much everything the client needs and wants.

The “Gold” high-end price should be much higher. At least quadruple the Bronze price, and maybe even nearly double the Silver - we often made it even more than that. This is absolutely ALL the bells and whistles you can muster *plus* the kitchen sink. You don’t really want anyone to take this option, but if someone paid you this much money you’d be *more than happy* to do all the work.

Most people don’t want to take the cheapo option. But if they do, you’re still making a profit.

Most people don't want to pay the exorbitant GOLD option. But if they do, you've hit the jackpot!

Most people want to take the middle, most balanced, option - the one they assume most other people take too.

Make Being a Freelancer or Smaller Agency a Selling Point over Your Bigger Competition.

You can reframe anything. If you have competitors who are bigger, they will likely also be slower, more expensive, and less flexible than smaller suppliers.

You can win by being the opposite of all the things clients find distasteful about bigger suppliers.

Demonstrating this gives you the chance to use your competitors' strengths against them while quashing any objections the prospect might have about working with a freelancer or smaller agency. These objections will likely only exist when working with large corporations or big brands.

You have to remember these people have jobs. And they'd like to keep them. And look like they make good decisions when hiring external help. Sometimes, prospects will pick someone mediocre and boring because they are a safe option. As the old adage goes, "Nobody got fired for hiring IBM."

Unless it's a formal pitch, you'll usually have no idea if you are competing with other suppliers for a deal. Regardless, you should still seek to demonstrate the positive aspects of working with you.

If you are a freelancer or smaller agency, be proud of your nimble, enthusiastic, ambitious, flexible, client-pleasing ways.

"Level With" Your Prospects in a Way Your Competition Might Not, Making You Appear More Trustworthy, and Thus More Likely to Close the Deal

As a freelancer or smaller agency, you have a huge advantage over your competition: You can say whatever the hell you like.

You can talk about what winning the deal will mean to you personally.

Whereas the same approach coming from a large established entity would appear silly. And they have extensive brand guidelines to stick to.

You can make the prospect part of your story. The decision makers will get a warm feeling for giving a scrappy, ambitious supplier like you a shot. They will feel good they've made a decision that benefits them - while they get to help someone else that they like.

When we pitched to Symantec, we told them how big of an opportunity it was for us. One of our employees remarked, *"This is a career defining project."*

That kind of statement is flattering - and goes some way to reassuring prospects you're going to deploy maximum effort, should they hire you.

Benefit from "The Pratfall Effect" - and What it Says About Being 'Too Perfect' and How it Can Harm Your Chances

A perfect pitch can actually be to your detriment.

Behold, "The Pratfall Effect":

"Details of the pratfall effect were first described by Aronson in his experiment testing the effects of a simple blunder on perceived attraction.

The experimental subjects consisted of male students from the University of Minnesota who would listen to tape recordings of an actor pretending to be a contestant for the show ‘College Bowl’.

The tapes contained staged interviews with extremely difficult questions given to an actor, who plays the character of <u>either</u> an unrealistically knowledgeable individual who answers a majority of the questions correctly (92%), <u>or</u> a mediocre one who answers only a few questions correctly (30%).

After the questioning, the strong performing character admits to a stellar high-school career marked with academic and non-academic successes, while the more unremarkable character describes an ordinary high school career, earning average grades with weak involvement in extracurriculars.

At the end of the interview, some tapes recorded the actor spilling a cup of coffee and apologizing for doing so, while others omitted this portion to serve as a control.

Aronson's research found that a knowledgeable blunderer was rated to be more attractive, while the more average ones suffered decreases in their perceived attractiveness.

Later research inspired by Aronson experiment defined appeal as a combination of liking and respect, and replicated similar results.”

~ from Wikipedia.

Don’t fear if you stumble a little.

As long as you demonstrate competence, a little mistake every now and then is humanising and could actually go in your favour.

Prepare for Your Call, without Making Too Many Assumptions that Can Actually Harm Your Chances of Winning a Deal

Of course, you should prepare for your call. You should look at all the crucial variables that pertain to your discipline.

If that's SEO, look at their search visibility, their on-site SEO, and their link profile.

If that's copywriting, look at their sales copy.

Perhaps look at some of their competitors, and review their key metrics too.

Maybe come up with a few ideas of how you can improve their circumstances.

What you mustn't do is create gigantic slide decks containing campaign ideas for specific products or product ranges. (Unless, of course, they've specifically asked you too).

If you get carried away, you might find yourself putting THE BEST IDEAS EVER FOR … a product that's soon going to be discontinued.

Sure, it might still demonstrate your clever thinking. But it's better to do that when you have the sufficient background information. And pay.

"Stack Your Wins" and Use the Words of Others to Persuade Your Prospects that They Should Award You the Deal

More often than not, in principle, happy clients don't mind writing testimonials.

Especially if you use one of my charming templates to make such a request.

However, equally more often than not, they'll put it off as long as they can because "they don't know what to write".

Offer to write something for them and say "You can then amend it to something you are completely comfortable with."

Clients love this. Most of the job is done for them.

And nothing gets written they're not comfortable with being published.

This also enables you to ensure the testimonials include specific objections you know your current prospects have.

Here's an example:

"I was worried Jon's small agency, Charm Offensive, wouldn't have the resources to handle our complex account, but boy, was I wrong. They are far more passionate and efficient than our last agency who didn't make us feel important at all, and did the minimum amount possible to get their invoices paid.

Charm Offensive impressed us from day one and went on to achieve remarkable results such as increasing our traffic by 29% in just 3 months. They went above and beyond to achieve these results. What they lack in size, they more than make up for in work ethic, creativity and well, being damn good at what they do."

This deals with the objection that many big brands worry small agencies will be unreliable or produce lower quality work than their larger competitors.

It turns your perceived weakness (small size) into strengths; flexibility, passion, work ethic, creativity, and efficiency.

It also plants the seed that perhaps choosing an agency merely for their size isn't the sensible decision they'd assumed.

It turns their strength (large & established) into a weakness; impersonal, lacklustre, uninspired, by the book, inflexible.

In addition, it's wise to try to get testimonials from a broad range of clients. In my agency days, this meant getting case studies from companies of all sizes, sectors, and for lots of different types of work.

Now I sell information products, I also try to get testimonials from a diverse range of people from different backgrounds. In short; you want testimonials from men and women, of varying ages, nationalities, and abilities, who do all sorts of different things.

When people watch or read testimonials from people they share things in common with, it helps inspire them to think "Ah, if they can do it… I can too."

There are of course exceptions to this, such as if your offering caters exclusively to women. But even if that's the case, do your best to seek testimonials from a diverse range of women.

Think about the objections the person who's agreed to provide the testimonial can help you overcome for buyers or client similar to them.

Try to write them in the language they would use, but with the meanings you need, and with demonstrable facts.

The better you get at this, the less back-and-forth and editing there is. And you get winning testimonials.

Make Your Pitch Memorable - so Those You Pitch to Can Easily Parrot it to their Colleagues and Superiors.

The single biggest mistake people make is to give WAY TOO MUCH DETAIL.

Your prospects are interested in what you can achieve for them.

Sure, you need to show *HOW* you're gonna do it. But they don't need the Director's Cut. They don't even need the whole movie. They need the trailer.

Brevity makes your pitch easier to remember, and thus, easier for your prospects to tell their colleagues about.

Do a practice pitch with some of your peers who will have some understanding of your offering. Ask them to be honest, and tell you if you waffle or they find it hard to focus on parts of your pitch.

While doing this, notice any parts you're skipping over or struggling to say confidently. It's often these parts that you don't fully believe in.

For instance, when I worked for London digital marketing agencies, they all had a penchant for contrived 'process diagrams' that showed their offering as a logical flow illustrated with cogs and arrows.

I didn't believe in them, so I'd generally rush through them as fast as I could.

Ideally, I'd skip them entirely. For instance, if I was accompanying a sales guy, rather than one of my bosses, to a pitch I'd just delete the slide.

Look for your own slides that fluster you and either edit them, or delete them entirely.

If you only say things you believe in, your pitch will be delivered with more confidence, and in a tone, speed, and volume your prospects can actually hear!

Price Your Work Using a Clever Little Trick so that Prospects Can't Get Away with Paying You Too Little for Too Much Work.

Your prospect may wish to negotiate on price.

That’s fine, and expected.

You’ve priced it to include some profit and some ‘negotiating space’.

Try not to let them to reduce the price while expecting the same level of work.

If they want to reduce budget by 20%, find areas of work you can remove.

Maybe to get the deal over the line you reduce the price by 20% and the work by only 15%. But that’s fine, because you’d factored something like that in initially anyway. You have a small amount of leeway.

But you have to stick to this:

If you make the conversation about reducing budget <u>also</u> about reducing the amount of work, they will be a) Less likely to do it and b) You won’t end up working the same amount of time & effort for less money.

How Our Small Agency Won a $Multi-Billion a Year Client.

I’m lucky to have been sufficiently desperate enough to get drunk and write an email that solved a lot of sales problems.

It also created a lot of new problems. Good problems. Problems like, “ok, what the hell do we have to say to a $multi-billion a year company?” and “OH MY, how are we going to spend all this money?”

My drunk email led to many meetings. But none as important as the big one, Symantec.

I’d won pitches and done deals with big brands before, but that was when I had the benefit of working for a big-name agency, with all the advantages of scale it brings. Advantages like other big client names on our roster, lots of nice testimonials from other big names, fancy offices, and well, the appearance of competence. Such appearance is comforting to marketing teams at big brands, who will often prefer to work with similarly big agencies, seeing them as less risky.

You have to remember that full time employees want to look after their job. Not everyone wants to try creative, daring things. Some people will go out of their way to avoid any hint of innovation.

Our size was not the only thing working against us.

We had no case studies for the type of work we were pitching for.

We had no clients that were the same size, or even close in size to Symantec.

We had no cybersecurity clients or experience in that sector.

But we did have their attention…

And we made a great first impression…

… And then a good enough second impression that they invited us to their offices.

… And then *yada-yada-yada*… a few months later, we won the deal.

There's a photo of me somewhere holding up the 6-figure purchase order for the first quarter's work like it was a WWE championship belt.

How did we do it?

This piece is going to dissect the 'yada-yada-yada' above, giving you a step by step guide to how we closed the deal.

Positioning

The way we positioned the agency didn't change. It so happened to fit perfectly with the issues Symantec were having.

They responded enthusiastically to the amusing cold email I sent them, and we organised a phone call.

On this call, we spoke for a few minutes about the email.

As many people did, they asked, *"Do you send a lot of these out?"*

I usually replied to this with something like: "*I've sent a few. I can't claim I'm not speaking to other people I'd like to work with, for I'm quite fond of food and shelter."*

Whatever you do, don't tell people you indiscriminately bought marketing lists and then sent the same email to thousands of people. If you're like me, and this is exactly what you've been doing, be sure to use a suitably cheeky, charming, and vague response like the one above.

After the talk of the email, I asked them, "*Who wants to go first? I can do a little introduction to our agency, and then I'd love to hear about you guys and what you're working on. How does that sound?"*

They agreed and I launched into my usual pitch.

I'd mention how I used to work at other agencies and while I did great work, I never felt I could do the type of work I wanted, and that often there were tactics used that I didn't think were in the best interests of the client.

Thinking about it, this is another little bit of persuasion at work.

I was demonstrating that integrity was important to me. That I'm not a 'money at all costs' guy. I care about the work. I care about client relationships. Not just because of the money they pay, but because you should be good to people.

I would often say "I don't know why we have this thing in business where it's OK to be dishonest. You can get away with a level of duplicitousness that you wouldn't in your personal life. I have never understood this quirk, and I hope I never do."

This wasn't an act. These are genuine beliefs. I'm keenly aware they are not remarkable in any way, but they are still important. In a sea of slick, craftily prepared pitches, there is something to be said about ditching the veneer of authority, and saying to people *"Look, I'm gonna level with you…"*

Sales Hooks

There were a few different sales hooks that I would use repeatedly with all prospects.

I'll run through these now.

"We out-think and out-work the competition."

This, looking back, is perhaps a bit of a cliche. However, we did come up with great ideas. Some of them, as this section will demonstrate, were absolutely fucking crazy.

We also worked hard. We really did want it.

The ideas we produced showed our clever thinking.

Our enthusiasm for our craft helped persuade them that we would work hard.

<u>Enthusiasm is the single most effective cosmetic available.</u>

It doesn't prove anything at all about work ethic specifically, but it answers an important question in the prospect's mind.

Can you guess what it is?

Yes?

No?

Bueller?

That question is:

“Do they give a shit?”

Results can demonstrate competence.

But case studies only show what you’ve done in the past, and with other people.

Your prospects need to know you are going to exert the same effort to further their ambitions.

Enthusiasm is one simple and effective way of doing this.

Enthusiasm for their results, which are fuelled by enthusiasm for the strategies you have recommended to them.

“We are transparent and honest to a fault.”

I would often tell a story about an old boss of mine. He was talking about client reporting, and he showed us an old slide of his, where he had reversed the axis because it made bad results look good.

I was as amazed this is a tactic that would work on anyone over the age of 4, as I was that he would delightfully brag about such a dishonest approach.

He could, of course, have been joking. My mind is likely biased because I’d had seen for years all the little tricks used to win clients, keep them for as long as possible, and if at all possible sell them more stuff.

Some of these ‘tricks’ were ethical and honest.

Some of them were abhorrent and I wouldn’t go along with them.

Some of them were in a grey area that made me uncomfortable.

I made sure not to spend too much time talking about competitors. You should never look bitter or ‘snarky’.

Don’t draw your prospects attention anywhere else, even if it’s to try and gain some advantage.

The focus should be on you.

Instead of decrying the tactics of your competitors, talk about your transparent approach and honest nature. As long as it’s true, of course.

As an aside, if you’re nervous about the whole sales process, I think it’s ok to mention it sometimes.

It’s disarming. Don’t do it so much that they don’t think you’re ready, but you can mention the gravitas of the situation.

I’d often ask for more glasses of water, because I would genuinely get nervous, especially after talking for so long.

I’d say something like:

“I’m sorry about this… My throat is parched! Nerves... But the good kind of nerves. Excited, innovative marketing campaign idea-conjuring nerves!”

At each meeting, I would thank them for the amazing opportunity.

I know this may be at odds with other sales advice out there, but it’s always worked for me.

“We execute innovative campaigns, not pursue pointless busywork.”

This was referencing my experiences working with other agencies.

They would often do work that was only there to fill up space on an invoice.

It provided no benefit to the client.

This is pointless busywork.

It looks like a lot.

But it doesn’t deliver any value.

It’s often work given to the most junior member of a team.

I’d only bring up the ‘pointless busywork’ that I’d seen being carried out in my time at other agencies briefly.

Again, you don’t wish to look bitter or resentful or at all negative.

The only reason to bring up the ‘pointless busywork’ employed by other agencies, was to contrast it with what I wanted to talk about, which was our penchant for developing truly creative, daring and effective marketing campaigns.

I’d lead into talk about our case studies, and the results they achieved.

Then I’d talk about the methods we used to get those results.

And then I’d talk about how we could do something ‘similar but different and better’ than the examples I’d spoken about.

“We want you to be our next case study.”

This is a little device I’d use a lot.

I’ll explain it by talking about a recent post on the Charm Offensive group.

There's a post on the Charm Offensive group at the time of writing containing an offer of free work.
She asked if she could post it and I said sure.

She told me she wanted *"a damn case study"* on messenger.

I told her, *"put that in your pitch."*

She said, *"Haha. Surely, I should write about the results I can deliver?!"*

I said, *"Yes, that is your primary message, but your lust for a case study can also be used to great rhetorical effect. Your own self-interest is a clear motivator. Being honest about it makes a persuasive case that you really want results."*

... Or something like that but less articulate.

I've used this in both cold pitches and emails to my list / posts to my group before.

Here's something I came up with that you could perhaps use in a cold pitch:

"I need case studies. The more impressive the better. The more I have, the easier it is to get more clients that pay more.

I NEED to get results as much... or almost as much as you.

Don't get me wrong, it would be unfair to suggest I care as much about your business as you do. Of course not. But as for caring about delivering results, absolutely I do."

This is a great little device.

It's great when you can leverage good qualities (being unusually honest) for great ethical persuasive effect.

Let's recap:

- Your own self-interest can be used as an effective persuasive tool.
- This self interest, however, is only effective if your goals are contingent on you achieving the prospect's goals.

It’s a great little sales hook you can use when speaking to a client.

“All the benefits of a big agency experience, but without the ‘fancy offices’ price tag.”

I knew I might be up against other agencies who were bigger.

I knew that big companies often preferred big agencies because they were seen as safe.
So I took their supposed advantages and made them disadvantages.

Or rather, I took our disadvantages and made them advantages.

Big agencies may seem like a safe pair of hands, but what good is a safe pair of hands when you need to deliver results?

The big agencies were bureaucratic and set in their ways.

We were lean and flexible.

The big agencies were expensive, because they had to pay for their fancy offices.

We had lovely, ‘shabby-chic’ offices. If we wanted a fancy office, we’d have to work hard for it…

“We don’t hire from other agencies, we train people from scratch”

This was true. We preferred to hire people when they were ‘green’ and then train them up.

“This way, we can teach them our wicked creative unorthodox ways from the start.”

The First Meeting

I remember the first meeting because it didn’t start well.

The taxi took me to the postcode I was given but it led to a residential estate. There were no gigantic corporate offices to be found. And I was about to be late.

I was frantic in the taxi. Sweating buckets. Finally, I called my contact at Symantec.

Mystery solved.

My point of contact had given me her home postcode rather than the one for Symantec’s offices by mistake.

I was told the actual postcode and arrived 20 minutes or so later.

I think this little mistake probably helped me.

We had a little laugh about it. This helped maintain the informal, friendly tone that was present in my previous email correspondence with them.

I can’t give you the absolute specifics on the first meeting, but I do know the general approach I took to all sales calls that had been a part of my arsenal for many years.

I say *“Who wants to go first? I can do a little introduction to our agency, and then I’d love to hear about you guys and what you’re working on. How does that sound?”*

Then I proceed with the description of my agency.

“I used to work at digital marketing agencies for many years. My last role was running the social media department for I-Spy Marketing, working with brands like Kickers, UKTV, Radisson Edwardian Hotels, and countless others. “

“After 5 years of working for other people, I decided to start my own agency with my brother, Gary…”

I’d then give a brief outline of our team members, clients, and the type of work we’ve been doing.

Then it's their turn.

This is when you illegibly write everything they say down.

When they’re done, you can ask questions.

You need information.

They like talking about themselves.

It's a match made in heaven. The heaven of profitable, mutually beneficial relationships, that is.

I asked questions like:

What are your priorities this quarter / year?

What have you been doing to try and achieve these goals thus far?

Are you currently working with any other marketing, PR, or creative agencies?

How have you found working with these agencies?

If you could give me a one line brief for what you wish to achieve, what would it be?

Who would you say are your biggest competitors?

Do you think any of them are doing anything especially well?

Try to ask these naturally. Don't interrogate them. Have a conversation about their marketing as you would a dear friend.

You can even add a dash of charm to these requests too.

"Apologies for being potentially impertinent, but would you mind telling me if you're working with other agencies at the moment?"

From asking such questions, I discovered:

- They wanted to be more well known for their expertise in the enterprise BYOD (Bring Your Own Device - don’t ask!) and cloud security offerings.
- They wanted to use social media / clever uses of digital marketing to achieve this.
- They weren't happy with their existing social media & content agency. They weren't creative. They were slow to respond to requests. They couldn’t keep up.
- They ‘had budget to play with’. Whatever that means…

I repeated this information back to them and asked if it was correct. I can’t recall if I did so at the time, but if I were to do it again, I would definitely have included the final bullet point to add some levity to what is essentially, not an especially exciting piece of information.

I said, *“I’d like to put together some research and a few ideas on how we could help you achieve your goals. Would that be ok? In my original email, did promise to provide you with some free ideas you can steal.”*

They were always likely to say “yes” to such an offer anyway, but it never hurts to add a little light-hearted remark at the end.

All of these little interactions add up. You’re building up a case that not only are you competent enough for the job, but they like you, and wouldn’t mind working with you.

There is no magical persuasive silver bullet.

The key is to become naturally disarming and persuasive, which you can theoretically learn with guides such as this one.

However, the real reflexive knowledge and fluency only comes with consistent practice. So, like everything else then…

They said yes to my offer of research / initial thoughts and we booked in date and time to come and present our findings and thoughts.

The Research / Initial Thoughts Deck

Now, the task at hand was simple: Create a deck that showed Symantec we were experts at what we did and that we understood their market...

Research

We audited the social media accounts and content marketing efforts of Symantec and their direct enterprise competitors.

This was partly automated, using scraping tools.

We scraped their enterprise competitors' websites.
This showed us some important information for each individual page:

- How many links from other websites pointed to this page.
- The Google PageRank (1 to 10) or MozRank (1 to 100) of each page. This shows roughly how important this page is to Google.
- How many shares the page garnered from Twitter, Facebook, Pinterest, and LinkedIn.

We also reviewed the social media accounts of each of their key competitors, providing an overall insight into the types of activity employed.

Armed with this data, we were able to create a deck that gave a fair representation of the social media & content marketing landscape for their sector and for their particular target areas.

Symantec, as expected, didn’t come off looking great.

However, nobody was looking spectacular.

We saw this as an opportunity for Symantec to innovate.

Our analysis of their market provided us with little content that inspired or excited us.

We decided, instead, to look at successful content from a wide array of sectors.

Success meant the content had achieved mass social media shares, PR coverage, or both.

This included work like:

The Evolution of Western Dance Music - How Music Travels
This piece showed how music has developed over time, showing which genres and styles influenced others. It was visually intriguing. This piece is actually by a travel brand, rather than something music related. The last word in the piece,‘travels’ makes it relevant.

It also benefits from being contentious. People are going to argue about the minutiae of history. The visually enjoyable format chosen makes this content all the more irresistible to share.

The Trainline - Interactive Michelin Star Restaurant Map
This was a Google Maps mashup that included the locations of all the Michelin star restaurants in the UK.

Simple. You could sort the list by number of stars. That’s it.
However, it’s relevant to what The Trainline offer.
It’s somewhat useful.

Nothing amazing, but it had been linked to and shared extensively. This demonstrated the power of “branded utility”.

Simply Business - Small Business Guide to Twitter
This was a visual flow-chart / infographic that introduced small business owners to the subject of using Twitter for marketing purposes. It directed people to various external guides and articles.

If you can curate information in a visually appealing way, you can create a resource someone will link to. This piece has been linked to extensively by authoritative publications.

This made me realise that there is a real demand for content that’s easy to digest and visually stimulating. Sometimes, reading big long reams of text isn’t the best way to learn.

I said *sometimes*. :D

These examples demonstrated the kind of content we thought Symantec should make.

Or at least, a jumping off point.

Nothing too crazy. Nothing too daring.

We could demonstrate how each of those examples had lead to:

- Increased PR coverage (containing links).
- Improved visibility in Google.
- Increased social media visibility.

Our big pitch was:

“To achieve amazing results, you’ve got to bring something to the table.”

"We need to take your expertise and turn it into content that will get featured in relevant tech publications and shared extensively on social media."

The presentation was well received.

We had demonstrated our rigour with our research.

We earned their enthusiasm with our idea to create truly innovative content pieces.

I actually had a name for such content pieces.

I called them "Content Stunts".

Other people have called this exact same thing "Big Content".

It refers to content that's more than a blog post. It's graphical. Or better, interactive. Or animated. Or something else that makes it stand out from the usual dross.

It's important to have an offering that's yours. The more you can make your pitch look like a coherent plan, rather than an amalgamation of all sorts of ideas, the better.

You can have lots of ideas, but you need an overarching system. A process. Something repeatable. Something you can easily describe.

This is made easier by telling stories.

Well, going through case studies.

This takes away the objection, "this all sounds good… but would it ever work in real life?"

In normal circumstances, one might think it’s a weakness that we couldn’t find niche specific case studies impressive enough to point to.

Like with many of my weaknesses, I turned this into a strength. The lack of examples pointed to an opportunity for Symantec.

They agreed that they needed to be creating the ‘Content Stunts’ I’d mentioned.

We had convinced them of the type of thing they should be doing.

“May I put together some specific campaign ideas based on what we’ve discussed today?” I asked.

They agreed. We arranged a date to present our ideas for potential content marketing campaigns.

Brainstorm Time

Now all we needed to do was to devise a sales pitch containing relevant, creative ideas with an effective process to develop and promote them.

We got the team downstairs and wrote out all the pertinent details about Symantec and their objectives.

Then anyone is free to contribute any ideas or thoughts they think might somewhere useful.

Anything goes. Not everything will be good.

Some will be hilariously bad.

You can always cull those later.

But for now, you need it to be as free as possible.

Have fun. No judgement.

There are no wrong answers. It's time to be playful. Well, as playful as one can be about enterprise-level cybersecurity solutions, anyway.

These brainstorms would more often than not, take place on Friday afternoons, a time when we would take advantage of the contents of our drinking globe.

We did multiple brainstorms. I sorted through the ideas and picked a selection of what I thought was the best. (I still let some absolutely insane ideas get through…)

Now, to put a pitch deck together…

The Pitch Deck

The first few slides should always be a brief introduction to the campaign and how you've gotten to this point.

Most people will skip it, but others will read it to remind themselves of the specifics, and others may have never seen the document before.

You must remember that your document is likely to be forwarded to colleagues and superiors who you haven't yet met. Be sure to add a slide or two so that as many people as possible can be persuaded by your slide deck.

I had the middle bit - the ideas.

I needed to show how these ideas would lead to the kinds of results I had suggested were possible.

It was at this point I started talking about ‘premarketing’.

Most of the time businesses create content and then beg for journalists to publish it.

Instead, we would ask journalists their thoughts on our ideas. We would ask them if they would publish an article based on what we wanted to create.

If we accrued enough positive responses, we would create the piece. If we didn’t, it would be back to the drawing board.

This mechanism, we said, would mostly protect us (notice the use of ‘us’ and ‘we’ when I refer to conversations with Symantec…) against creating content that fails to achieve any significant results.

It’s a technique that is reliably effective as it provides a counter to the objection “What if people don’t like our ideas?”

Such a tactic doesn’t cost anything, either.

While we couldn’t share the risk financially, as it costs to do great work, we could design our process so it involves less hoping, and more predictability.

You can then begin to stack these little persuasive devices.

Rigour
We had research showing us the exact types of content that do well in their niche. We knew where the gaps were.

Creativity
We developed a range of ideas of interesting, creative ideas for content pieces. We were sure the client had never been pitched anything like we’re about to propose.

Security
We had a process for getting those ideas validated by journalists at key publications.

This approach can be persuasive to journalists who appreciate being involved in an idea from the start, rather than it rammed down their throats later.

The key is to have an intoxicating mixture of creativity and compelling logic and process.

Rehearsal

We were going to take more of the team with us this time.

We actually rehearsed. We never usually did.

Nothing over the top. But we needed to ensure our presentation didn't go over time and nobody fumbled over anything too much.

Often, when someone is fumbling over something, it's because they either don't understand or don't believe in it. Neither of these signals are especially helpful to our cause.

When I worked at other agencies, I would often delete the most jargon-filled, bullshit-rich slides from my presentations. If I was unable to delete them in time, I would rush through them.

Cut your deck down to what's important.

That is, the magic that's going to help the prospect achieve results.

The Big Pitch

We had 4 members of the team at the big pitch. There was me, my brother Gary, and our account managers, Kevin and Heather. (They handled client relationships and managed the campaigns for those clients).

This is where we could pitch our ideas and our process for achieving results with those ideas.

We delivered a pitch that was approximately like this:

5 minute introduction - How we’ve got here. What we are going to talk about today.

20 minutes - Our ideas.

20 minutes - Our process for getting results.

10 minutes - Intended results.

XX minutes - Questions & Answers - as long as they like!

Another benefit of the content marketing campaigns we had pitched is that they benefited multiple departments.

- Increased social media shares & visibility.
- Improved visibility in Google.
- Increased positive PR coverage.
- Increased traffic.

Who doesn’t like showing their superiors improved metrics?

Especially when they don’t have to do anything to achieve them, save for having some faint involvement. But enough involvement to take some of the credit.

That was fine with me. I’d much rather share the glory and have internal advocates endorsing me, or at the very least, not saying anything bad about me.

Made the Team Bigger

We also teamed up with a design and development agency. We talked up how closely we had worked together before. They had their own great case studies which no doubt further helped our case.

If you hire freelancers, include them on your team. They are part of your team. Just because they are externally contracted doesn’t change this.

Every Little Helps

As we were told their current agency were too slow and unresponsive, we made sure to reply to their emails within 5 minutes.

We went further than that.

We made sure to always be first.

We would be proactive. We would send over a thank you message containing all of the meeting notes no more than a few hours after a meeting had ended.

We would send over additional ideas or thoughts that we thought might be useful to our efforts. This demonstrated how enthusiastic we were while also employing a classic sales trick: the assumptive sale.

We didn’t bombard them, but we made sure to make an impression. We only ever sent impromptu emails if we had a genuine reason. It had to have a purpose, as well as helping persuade Symantec of our ridiculous levels of enthusiasm and hardcore work ethics.

We wanted to show Symantec what working with us would be like. They wouldn’t have to imagine it. We would demonstrate it.

I also made sure to try to get on the phone with my points of contact as often as possible. The phone is a far more efficient tool for building rapport quickly than email alone.

I wanted to involve my contacts in the creative process as much as possible. If they’re engaged in the ideas, and took ownership of them mentally, they would be far more likely to pursue actions that benefit our campaigns.

This also gave me more opportunity to talk informally with my contacts. I’d level with them, and tell them how exciting the whole process was, but I’d never be desperate.

You can be meek and self-effacing, but never put down your work. You should have confidence in your work. While you don’t need to always show absolute certainty, you don’t have to pretend such opportunities are no big deal.

You should use these opportunities to build rapport with your prospects and to help feel more involved in the campaigns you are creating.

You should use language (‘us’ and ‘we’) and behave in a way that shows you are a reliable, trusted advisor who has their best interests at heart. I know. It’s not rocket science.

It is not always possible to have clients that are as enthusiastic as you about their campaigns. If you are able to engender such an attitude, it makes the process far easier.

You should also mention your own goals and how they are contingent on the client achieving great results.

I often told Symantec this was my opportunity to get a case study that would change my business. My self-interested motivation benefited Symantec. I made sure to repeat this additional motivation wherever fitting.

Let’s look at the core elements that helped convince Symantec we were the right agency for the job:

- We are on the same side. We share the same goals. Our goals of growth and world domination are contingent on doing work of sufficient excellence and effectiveness that we can write a case study about it.
- We like each other and share a similar sense of humour. (This might be most fitting for the person who responded to your email, but the same may apply to their colleagues).
- We have researched their market in detail, providing us with useful intelligence to create work with the greatest chance of developing content there’s a need for.
- We have outlined a full process that maximises the campaigns chances of success.
- We respond to their emails quickly and we are proactive almost to the level of obsequiousness.
- We’re honest and transparent. Our correspondence in all forms will demonstrate this.

Cialdini's Principles of Persuasion - Put to Work

The following principles were deployed throughout our pitch process:

Authority - Our expert review of the social media and content marketing efforts in their sector helped position us as experts. We genuinely new more about the social media and content marketing landscape in their market than they did.

On top of that, we explained how brands in other sectors had devised content projects that delivered impressive results. We knew this stuff.

This wasn't pretend. As such, we are able to present these ideas confidently. It is this mix of self-effacing charm and confident, enthusiastic ambition that has helped me win every client I've ever signed.

Consensus - The campaigns we were proposing would benefit multiple departments within Symantec. We would provide increases in social shares, search engine visibility, PR coverage and targeted traffic.

This helped persuade their colleagues that they should support our engagement, or at least not try to derail it.

Consistency - They said yes to a meeting. Yes to putting ideas together. Yes to the type of campaigns we should run... Next steps: Get a yes to our ideas. Yes to our prices. Yes to signing the contract.

Liking - They enjoyed the initial email enough to invite us in. We then proceeded to smother them with enthusiasm, good ideas, and yet more enthusiasm. We got on.

People like to do business with people that they like.

Simplistic, but absolutely true.

Reciprocation - We've given them a whole range of expert guidance that will be useful to them regardless of out future relationship.

Such ostensibly virtuous efforts don't guarantee success, but it can increase your chances.

Scarcity - I can't take credit for this one. They had targets. And deadlines for those targets.

As such, they probably didn't delay our engagement anywhere nearly as long as they would have been familiar with.

Unity - We build rapport with our key client contacts by trying to speak with them regularly, being frank, honest, and enthusiastic throughout. In addition, we wanted to ensure our contacts felt involved with the campaign construction. It would be their work too.

They can use the results to further their professional ambitions.

DO’S, DON’T’S, & DEFINITELY DON'TS OF SALES CALLS

DO make your best effort to be enthusiastic.

It is an intoxicating quality. Especially when combined with demonstrable knowledge. I won many deals over much bigger agencies because of this combination.

DON’T blather on and on and on about your life / company history, and other rambling tangents.

Introduce yourself, yes. But get to the meat.

DO ensure your technology is working before a sales call.

If you're new to sales calls, tech issues may fluster you. Don't be the reason your call is delayed or rescheduled. You can decrease the likeliness of this with a little pre-call tech prep.

DON'T bad-mouth competitors.

Even if your statements are true, you'll risk being perceived as bitter.

Focus on making your pitch better. You can talk about issues with suppliers in your sector in general – but make sure it's framed as how your offer is better, rather than just admonishing your competition.

DO talk up your results.

Case studies are a powerful persuasive tool, especially when combined with a gushing testimonial.

The formula is WHAT YOU DID -> WHY IT WORKED -> EVIDENCE OF RESULTS -> GUSHING QUOTE FROM YOUR CLIENT.

The words of others will sell on your behalf – often with more gravitas.

DON'T make your offer overly complicated.

While some projects are by their nature complex, your pitch should not be.

Sure, you need to know the intricacies of what you are offering but don't let them dominate your pitch.

Complexity isn't memorable. You need your ideas to be parrotable (to their colleagues and superiors) by someone who has heard you run through them once.

DO bring relevant team members to the call or meeting.

If you have a team, and they will be doing the actual work on the account, consider bringing them on sales calls.

I found bringing team members to pitches increased my close rate.

Junior team members don't have any immediate financial gain for winning a deal.

If anything, their life only gets harder if the deal is won – they'll have more work to do!

Because of this, their enthusiasm is seen as a love of the craft, and isn't tainted by the spectre of personal financial gain.

DON'T talk over your prospects.

It's easy to get lost in enthusiasm and interrupt clients at inappropriate times. I had to stop myself from doing this.

On calls, it's yet harder to avoid people talking over each other, especially when there's a lot of people on the call and there's lag.

When you hear anyone on the client side talking, stop talking. Pause. Say, *"Sorry, go on."*

DO ask questions.

Even if for no other reason than to look interested. It shows you're actually thinking about their unique situation. As we all do, clients love talking about themselves. Let them do so.

Your final proposal will be better – and more likely to convert – just because you've reiterated their exact situation back to them in the introduction in your proposal.

You can frame your solution as specifically beneficial for their specific situation.

It also takes the pressure off you. You can't say anything stupid if you're not talking.

DON’T assume your assumptions are assured.

I learned not to do too much pre-call brainstorming for clients.

Especially big companies, as I’d develop all the ideas, and then be told something like: “Ah yeah, good idea… but we are discontinuing that product line…”

I’d also make assumptions on what client could afford based on what they did.

It’s natural to do this. You can’t help it.

But you should question your assumptions.

I’ve met with gigantic luxury brands with meagre budgets and small little manufacturing operations with DEEP pockets.

DEFINITELY DON’T try to be someone you’re not.

You don’t need to be whatever person you imagine embodied being a ‘salesperson’.

You should be confident in your abilities. Polite. Enthusiastic. Interested. Knowledgeable. As long as you enjoy your job and find it interesting, you should be able to broadcast those qualities without too much effort.

How To Get Work When You're Starting Out

In January 2006, I was depressed. I needed a change. For some reason, I decided I wanted to move to London.

I had digital marketing skills. My strongest suit being SEO. I'd managed to get my business and some other sites ranked in Google, which made me some affiliate revenue.

I'd also done a tiny bit of freelance link building for an agency one of my friends worked for.

I decided to look for agency jobs in London.

Thankfully, Google existed, even back then :D

All I had to do was Google "SEO Agencies London" and a list of agencies appeared.

I emailed the first website that came up, sending them a bullet-point list of my skills. (I hadn't got a CV until I wrote one after they requested it!)

I got a response from the Managing Director. There was an immediate vacancy. We organised for me to come down to see them for an interview a week later.

I did nothing else but prepare for that interview.

I dressed up, shirt and trousers and shoes and all.

I *really* wanted this, and it showed. I demonstrated my knowledge and my enthusiasm and ambition.

It worked. One of the guys that interviewed me sent me this email:

“Hi Jon,

It was great to meet you yesterday, thank you for coming.

We would like you to do a brief assessment of www.gxxxxxxxxxs.com. Please list 10 things you would recommend to make the website more search engine friendly.”

All that stood between me and my new life in London was this task.

I decided to go above and beyond what they wanted.

But I thought I’d make sure I didn’t deliver something they didn’t want.

So I sent a follow up email, which was ostensibly to get clarification, but also demonstrated my knowledge in the process:

“Hey Leon,
Just a quick question…

Do you want purely on-page factors, or both on-page and off-page factors?

Kind regards,

Jon”

I got a reply shortly after:

“Hi Jon,

On the page factors please.

However, feel free to add some additional recommendations for off page factors!”

I remember spending a lot of time on this task.

There were huge stakes. I really wanted to move to London. I really wanted this job. And huge steaks.

I went well beyond what they were expecting - but without giving them so much to read that it would have annoyed them. I knew they had actual work to do. The reason for the job vacancy was they were under-resourced.

I over delivered - but without going over the top. I showed I knew my stuff. I showed I could work hard - and fast. And I showed I respected their time by not going WAY overboard.

It worked. I got the job.

“Hi Jon,

Hope you had a good weekend.

Well done with the assessment, we were very impressed. You showed in the interview that you are fully versed in SEO and the document you sent to us confirmed it. We're looking forward to you starting.

Thanks,

Leon”

I moved down 2 weeks later - and that started my career in digital marketing.

What can you learn from this?

A) You can get a ‘professional’ job despite having no formal qualifications. If you have knowledge, and can demonstrate it - while also demonstrating you are of sound mind and aren’t a complete twat, you can get a job in the creative industries.

B) When you have an opportunity, such as a potential job, or a potential freelance client, going the extra mile makes all the difference. Sure, maybe I’d still have got the job even if I’d not done this. I have no idea. I didn’t know if I had any competition for the role. So I knew I had to not only impress - but I had to be better than my potential competition.

How To Go The Extra Mile

When you REALLY want a deal, there are little things you can do to give yourself an advantage.

When we were pitching to Symantec, they told us their current agency didn't seem motivated, and didn't have many exciting, creative ideas.

To show we wouldn't be like this, I'd email them from time to time, just to show them how much I was thinking about their brief.

I'd get to the office early, 7am or so, and send an email saying something like:

"Hey folks,

Happy Monday!

I've just seen [this content piece]() and realised it was similar to some ideas we discussed on our recent call.

Good news: It got a TON of shares and PR coverage.

Sure, it's not in the tech sector, but it shows our thinking is in the right place.

I promise I won't bombard you with emails like this - but thought this was relevant to our conversation, so I thought it best to send it on.

Have an excellent day :-)

Cheers,

Jon"

This shows you are genuinely interested in the project you are pitching for.

Sure, it could be seen as you just wanting to win a deal. While it's true you want to win the deal (or I'd hope so!), this kind of thing shows you have a love of the craft. An appreciation of the little details. An excitement for the all important minutiae.

Don't overdo this as you could risk annoying your prospects. They have an inbox too - and seeing your name keep appearing might frustrate them while their feverishly trying to hit a deadline.

Here's another example of the kind of email I would send:

"Hey Rebecca and Sarah,

I found this awesome piece of content. Look at those shares!

I think we can use a similar visual style for our own content efforts. It'll help us create something genuinely useful, while also creating something more than just a boring set of blog posts. The visually appealing nature makes it more shareable. It's also more likely we will be able to get journalists and other influencers to write about it and link to it. BONUS!

That's all for now.

Looking forward to our meeting on Thursday. :-)

Have a great day,

Jon"

Make sure you don’t try this with prospects who are clearly not interested in the craft. Some folks just have jobs and that’s all they are.

However, if you have prospects who do seem interested in getting results - and the little details of how to achieve them, you can build real rapport by matching their enthusiasm.

Try a 7am email sometime. If it’s well received, you can start numerous little mini-conversations like this. You can even schedule it in advance if you’re not a morning person.

Hopefully, they’ll begin to use unifying language too.

“I think this type of content could work for us too. We should discuss it on our next call.”

Before you know it, the prospect is talking like you’ve already won the deal.

That doesn’t guarantee you will, but it doesn’t hurt.
These little touches and nuances all add up.

If your pitch is good, and your price is in their range, and you’ve not offended them somehow, you’ll find yourself at greater and greater risk of winning the deal.

Thank You for Reading :-)

You've made it out alive!

I had a lot of fun putting this together. I hope you found it valuable, and are excited to put the principles and process into practice.

In other words: GO IMPLEMENT! :D

Let me know how you get on.

Send me an email to: jon@charm-offensive.co.uk.

I'd love to hear from you.

Oh, also, if you enjoyed this ebook, you might want to check out Charm Offensive Professional:

https://www.charm-offensive.co.uk/subscription/

It's my membership offering where you can access ALL of my ebooks, courses, training videos, swipe files, templates, and other prosperity-raising stuff.

If you use the discount code "closingwithpro" at checkout, you'll get 25% off your first month. Woo!

Cheers,

Jon