

HMA

HIDDEN MARKETING ASSETS

University

INTERVIEW SERIES

**Coaching Lessons For Getting Clients
From A Marketing Coach
Volume II**

*Michael Senoff Interviews Richard Case
Marketing Expert*

Dear Student,

I'm Michael Senoff, founder and CEO of HardToFindSeminars.com.

For the last five years, I've interviewed the world's best business and marketing minds.

And along the way, I've created a successful home-based publishing business all from my two-car garage.

When my first child was born, he was very sick, and it was then that I knew I had to have a business that I could operate from home.

Now, my challenge is to build the world's largest free resource for online, downloadable audio business interviews.

I knew that I needed a site that contained strategies, solutions, and inside information to help you operate more efficiently

I've learned a lot in the last five years, and today I'm going to show you the skills that you need to survive.

It is my mission, to assist those that are very busy with their careers

And to really make my site different from every other audio content site on the web, I have decided to give you access to this information in a downloadable format.

Now, let's get going.

Michael Senoff

Michael Senoff

Founder & CEO: www.hardtofindseminars.com

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Coaching Lessons For Getting Clients You'll Want To Know From A Marketing Coach.

This marketing expert didn't create a marketing coaching system so he could retire. He's still out in the field selling and working his coaching practice. And in this interview, you'll hear what he's been up to for the last couple of years along with 10 of his most recent coaching case studies that illustrate important lessons about his (HMA) Hidden Marketing Assets System.

Richard has his coaching business down to a science and that's probably because he knows how to close deals by showing prospects the money. According to Richard, if you can't show decision makers where their companies are losing money, you're just another marketing guy – and businesses are tired of those.

So in this interview, you'll hear exactly how Richard closes his deals and where he finds his coaching clients. Believe it or not, he gets most of them from the same alliance. And at the end of the interview, Richard also answers questions from HMA students like you.

You'll Also Hear...

- Where to find alliances to work with in your area – and how to consistently close deals
- The newest ideas for finding hidden opportunities in your clients' businesses
- How Richard sometimes uses the same USP for different clients – and how to look for parallel situations where you can do that too
- How Richard knew he had missed the mark on one of his USPs – and what he did to correct it
- Ways to get salespeople to dump their existing paradigms and integrate your USP
- How Richard's been running easy group trainings, how much he charges, and who this type of training appeals to
- Ideas for time management – and shortcuts for coaching success.
- What kinds of businesses are the easiest to coach– and which ones you'll probably want to avoid
- And much more

Richard charges different clients different rates for his coaching services, and you'll hear how he determines when to charge the big bucks and how to do it. (He made \$48,000 from one recent coaching client alone!)

So sit back and listen to how Hidden Marketing Assets founder works his coaching business and find out how you can leverage off of his expertise along with the combined credibility of the HMA system.

Hi it is Michael Senoff with Michael Senoff's [HardToFindSeminars.com](http://www.HardToFindSeminars.com). In this next interview with Richard, we have an amazing list of case studies. A lot of people said, "What has Richard been doing over the last couple of years?" So I called Richard and I said, "Richard we need to do another interview of some of your case studies of what you have been doing in the last couple of years." Richard has gone through his files. He has pulled out ten of his best case studies that will illustrate lessons and things that the HMA consultants can learn from what he has been doing out in the field. He will illustrate the power of the USP, the integrating of the USP and database marketing and alliances. You will see how one alliance that Richard has established over the years, keeps feeding him account after account after account. I know you are going to learn from these exciting case studies, so let's get going.

At the end of this interview Richard answers some of the most common questions from new and existing HMA consultants. We haven't done an interview in some time and out of all this time, the last couple of years; you are not sitting there selling consulting packages.

Michael: You are out there executing, aren't you?

Richard: Yeah.

Michael: So that is why I want to talk about some of the stories so that the consultants can hear from you and understand it. You are still out there executing.

Richard: Yeah.

Michael: Why don't we start with your Solid Comfort story? Tell the consultants who that is. Why don't you start with how you are getting these clients? Maybe explain how you are still very focused with your alliances; your MEPs across the country?

Richard: Solid Comfort is a furniture manufacturer that makes furniture for the hospitality business; hotels and things. When you go in and spend a night at the hotel, you look at your dresser and you look at your bed, that is who made it.

Michael: How did you get introduced to them?

Richard: They are part of the manufacturing extension partnership alliance that I had and developed over the last four years or so. That is an important thing that the HMA consultants. If they are looking to want to jump-start their practice and they are wanting to find new clients.

Alliances. Step number four is part of their system. It is probably the best way to go do it without spending any money. I would just recommend to all of them that they find groups and associations in their area, Chambers of Commerce, manufacturing groups, Economic Development centers, other training companies, accountants, CPAs, printers, sign companies. These are all groups that are helping small businesses to succeed. They need to establish some relationships with these types of groups because they are the one that can introduce them to their clients.

Marketing wise we just learned that the fastest way to jump start a practice is to try and get an alliance going. I would guess most of the HMA consultants have some of these relationships already that are sitting in their area. Then you want to use the PowerPoint presentation because that is exactly what I did here.

I did a workshop with a manufacturing extension partnership that sponsored it. Solid Comfort came to the workshop. We just taught them the HMA system. We followed up with a complimentary consultation and we closed them. There is no question that what we tried to do was assume that the consultant had zero relationships. We put telemarketing scripts in there. We put direct mail in there. We put cold-call scripting in there, but that has to be the last resort. That is the hardest way to go.

What we want HMA consultants to do is look at their own marketing assets. Take the time to say what relationships do we have. I have a friend that has been in the printing business, who is in the printing business. I have my CPA who works with other small business owners. I have a sign company around the corner that makes signs for small businesses. I have my local Chamber of Commerce. I have my local manufacturing association. I have my local Economic Development Group. These are all alliances and partnerships that

HMA Consultants should go after first. Yeah, if you are going to do cold calling, do cold calling to these groups. Banks. I am heading there. I have now a contact in a U.S. bank office that was a former client. He is asking me to come down and do a workshop for U.S. bank customers. So I am in the process of getting into the banks because banks are in a very competitive situation right now. HMA consultants, if you have a relationship with a community bank start there. I am talking right now about an alliance with a company that does workshops in banks already. Well, they go in and the workshops that they offer cover all of the areas of starting and running a business. Financial, accounting, succession, and setting up marketing. I asked the owner of this company, "Well when you do the marketing of this workshop, what if the client wants marketing help after that? He says, "I don't want to get there." That is where HMA consultants can come in. There are lots of companies that might train initially on marketing, but don't want to execute. So that is an alliance, where I use to think of it as a competitor.

We are learning our strength in the HMA system is execution. A lot of companies can go out and do training, but they don't then know how to engage the client, work with the client over 4, 5, or 6 months, get results for the client through a systematic step of execution. I am excited for the banks and I think you all should take a look at that. Solid Comfort came from a workshop that we did with an alliance that has been in place now for several years.

Michael: So when you did opportunity analysis with Solid Comfort what kind of hidden assets were really obvious to you?

Richard: Well they produced a great product so we knew that they had been in business 9 or 10 years so a long time; probably closer to 15 years. They had a lot of good clients. Holiday Inn, Best Westerns and good solid opportunities with hotels, but we learned that it was very competitive. They are a manufacturer. We have enjoyed helping manufacturers over the last few years because they have been getting a lot of competition from China, a lot of competition from India, a lot of competition from Canada and Mexico. Solid Comfort was in this boat. They were getting a lot of competition from overseas because hotel furniture doesn't have to be nice furniture. I mean it has to be put together well, but it is not for presidential family, it is for a guest. So they were getting hit by a lot of this competition. If HMA consultants work with manufacturers what we are learning is that we have to find another reason for people to do business with manufacturers other than price. If price is the key reason that people are buying, then they are going to go to India, they are going to go to China, and they are

going to go to Asia, Mexico where labor is cheaper. They are going to buy from these other places. It has been great as far as currently. In a slow economical time these manufacturers need a lot of help in differentiating themselves.

So with Solid Comfort, we took a look at those assets. We took a look at their credibility. We took a look at their performance. We developed a unique selling proposition. The case studies that we are going to talk about; several are from manufacturing. We assigned them a character trait of reliability, like Toyota. Toyota now is number one because they own the USP of reliability. When we have a manufacture like Solid Comfort where we can have a reliable USP, well but you have to do more than say that you are very reliable. What we did is we made a 10-point promise of reliability to increase profits for the hotel owners. On-time delivery, delivery of your furniture is guaranteed to arrive on the agreed delivery date or Solid Comfort will pay the freight on truckload orders. No unscheduled empty rooms costing you money. See these contractors and builders who order furniture, they have to have it there in the rooms on time.

Michael: Or they lose money on them.

Richard: That is right, they have empty rooms. Then we have a quote here. "Deliveries are on time 99.9% of the time with Solid Comfort. The performance of the product has been very satisfactory. Our furniture maintenance cost is among the lowest in the industry. All things to Solid Comfort." Now we have a USP that really matters. We had nine other points. Superior product, product replacement, the blanket wrapped, no carton disposals, zero freight damage, full assembled delivery, order accuracy, attention to details, and a five-year warranty. We have a certificate that goes out now with each furniture delivery that has those ten points on it.

Michael: That is nice.

Richard: Yeah. They get their furniture and there is a certificate of reliability.

Michael: Let me ask you. You have a lot of different points and this has always been something that has been kind of confusing to consultants. What is the tag line USP if you could only pick one of those? Let's say on Solid Comfort's web site you are integrating that USP on the front page. What is the USP slogan that is going to ring all through the company?

Richard: A 10-point promise of reliability to increase your profit.

Michael: How long has that been integrated?

Richard: That has been in there now for it's second year. They are having record sales.

Michael: Record sales since they made those changes.

Richard: That is right. They got it integrated into their brochure. They got it integrated into the web site. I just have to emphasize to HMA consultants the beauty of this marketing system is that steps 1 and 2 can have so much powerful impact and that is the USP and the integration.

Michael: Where else was that USP integrated with Solid Comfort?

Richard: All of the sales people that are making calls now talk about on-time delivery guarantee.

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Richard: All right so it has to be integrated with all of the sales people that are either inside sales or outside sales. I would say that we are learning that over the years. It is that all of these stories and case studies, I have had some that have failed and HMA consultants will. They will have some that doesn't work. If I were to identify the number one reason that it doesn't work, it is that the sales people have not gotten around it and sold it. My guarantee doesn't apply because they are not getting it executed according to my instructions and their training. They have to do that. If they don't, then the guarantee is not applicable. That is the biggest struggle that we are learning. As HMA consultants, you need to understand that. You have to get it integrated into the sales people. Once I knew that these four inside sales people were doing it, we had record sales.

Michael: Did you move into database alliances with them?

Richard: Absolutely. They go into database. They are doing a newsletter that goes out to their customers, current ones. Each newsletter that goes out has this 10-point reliability on there so that they remind them and sell them again and again. We have sales people who are calling inactive customers, contractors that haven't worked with them for a while. All of that is contributing to record sales.

Michael: Let's talk about another one; Millennium Finance. Who are they?

Richard: This is a financial planner. They have been in the financial planning business for a lot of years, but he was trying to break out on his own away from the brokerage house that he was with.

Michael: Tell me how you made the contact and how you ended up working with him.

Richard: A workshop in a town not too far from here. He came to the workshop, again the workshop was sponsored by the manufacturing association that I am with. Many times they will promote to all businesses. So they did and here a financial planner came instead of just manufacturers.

Michael: What a great illustration. He paid to have come to the workshop, but he ends up coming to you as a one-on-one client.

Richard: That's right.

Michael: So he approached you after the workshop. What did he say? Do you remember?

Richard: Yeah. He had a complimentary consultation. So I went to his place of business. We went through his assets. We did the opportunity analysis just like we are taught to. I went through all of his assets and he said, "You know, I need a system. I need a way that I can get new clients on a regular basis so that I don't have to rely on my brokerage house." He said, "There are some marketing experts within the brokerage business." Which there are there are many of them, but they cost an arm and a leg for these guys to access. They just end up looking like everybody else. So he knew that he needed a strong marketing system.

Michael: What did you discover in the opportunity?

Richard: He had a good customer base. That is all we needed with this guy.

Michael: He wasn't working it?

Richard: No.

Michael: What kind of numbers?

Richard: He only had probably 100, but the top 20% were strong people that could refer and could endorse. Now we ran into some legal issues because that brokerage business doesn't allow direct endorsement. So we did workshops. We set up workshops with some of these top clients. They were just munch and mingles at the cabin that he owned in the area. He would only get 8 or 9 guests from these people to come out to the workshop.

Michael: Tell me specifically what you guys did.

Richard: We approached three or four of his top clients. We asked them to sponsor a dinner workshop.

Michael: Did you approach them by phone or through a letter?

Richard: He did personally, the financial consultant. He said, "I am working with a marketing guy and we are talking about doing some workshops. Would you mind helping us promote one?" That was fine. That was okay. They were all right with that. Personal invitations were sent out to the networks of these people. He had dinner brought in, catered in. Everyone was around a big table. He talked about the risks of retirement and many of the pitfalls that people get in to. That was another thing that we did that was unique. His unique selling proposition was not how to retire and get rich, which is the USP for everybody. We went the negative route. We went the pain route. We went the 10 ways that you could lose your retirement route. Ten biggest mistakes that you could make in retirement planning. They just loved it. They were great workshops. He does them now every quarter. He is on his way to meeting his \$20,000,000 under management, which was his goal.

Michael: Wow, that is great. Did you guys work on his USP?

Richard: On his UPS we developed a free report; *The Ten Biggest Mistakes That You Can Make*. The free report was sent out to his database. So he is communicating with them. We integrated it into his web site as well. We put together a little brochure for him. We were three steps in there; one, two, and three. He paid \$3,000,000 per step, but it was worth it to him because his alternatives were \$15,000 or \$20,000 if he worked through his brokerage house.

Michael: How did you handle his payments? Did you get them all at once or one at a time?

Richard: Each step at a time.

Michael: He didn't do alliances? Which step didn't he do?

Richard: Alliances, we kind of covered along with the database. We kind of did them together because most of his alliances were with his current customers.

Michael: Good illustration. How about Fitness Ridge? Who is Fitness Ridge? How were you introduced to them? How did they end up being one of your clients?

Richard: Fitness Ridge came through a referral from another client in the Southern Utah area. I went over and gave them a complimentary consultation.

Michael: Tell me how the referral came in.

Richard: The referral came in through a client that I had worked with down there before previously.

Michael: They called you?

Richard: We have a family member of mine that owns this fitness company and we would like you to visit with them. We went down. This is a company that is very well known for weight management spas. That is what this is. Fitness Ridge is a weigh management exercise spa company that has been in business now for probably four or five years.

Michael: These are overweight people that need to do something and they go there?

Richard: There are both. There are people that are there for their weight, but there are people that are there for their fitness.

Michael: Okay. Then they go stay there?

Richard: That is right. They stay a week, maybe two. All of their meals are provided, which are weight conscious meals. They teach them how to make a lifestyle change.

Michael: Why did they call you in?

Richard: To grow. They have rooms that they need to fill. That is their challenge.

Michael: Okay. You went over there and you met with them. You did the opportunity analysis.

Richard: That is right. The first thing that we did is find out that they did not have on staff a marketing person that could operate all of these opportunities. I am just going to list all of these opportunities. In the next 30 days, they went out and hired a marketing person. Then I was able to work with the marketing person and get them trained over the steps.

We had a USP first tried was a guaranteed weight loss. Well, we ran it for about 30 days. They were getting a lot of leads from the web site. The salesman there, they did have a salesman, but not a marketing manager. The salesman was handling those leads coming in and he was closing those leads. We determined that the weight loss guarantee wasn't really needed. It wasn't really affective. So we changed USPs. The USP that we ended up going with was the price USP. We found that all the other spas were charging like \$4,000 or \$5,000 for the week. Fitness Ridge would charge \$1,495 and give them as much as a \$4,000 or \$5,000 spa would. We went for price. We were a Walmart USP and boom. The hits to the web site just went up dramatically. His conversion rates went up as well, the sales person. Now they are headed for their first \$1,000,000 in business.

Michael: That is great. Let's talk about that you took them through the USP. The four steps in developing the USP. How was it that you guys missed the mark on that?

Richard: That is a great question. It is because they said, "We will go ahead and work those four steps." I said, "Fine." They didn't. They didn't call their customers. They didn't look at the competition, like they should of and they missed the mark.

Michael: Now when they said we would work the four steps, did they hire you and pay you for each one of those projects?

Richard: No, this was not a paid deal. This was more of a favor from me.

Michael: Okay, so you told them what to do?

Richard: That is right and they didn't do it. We came back and did it right, got them to do it right. The important thing to understand is that you have to do the due diligence on a USP. You can't just quantificate and think you got it. Don't worry. A USP doesn't have to be in stone. It can be changed overnight. None of these things are life or death issues.

Michael: Obviously their guarantee wasn't working. You came in and you pretty much identified what was wrong.

Richard: Yeah. Now they are going with that and they are just doing a lot better. You know, they never have done a mailing. We are working on a database with them. They have never done a mailing to previous attendees to the spa. We are working with them on a referral program. When they are ready to leave the spa, we are having them sit down and ask how it went. Can you get us three or four names? So now they are getting referrals that they weren't getting before. We worked on up selling as part of the integration of the USP. When they came in to the spa they would go through the weighing and all of that. They do their preliminary check-up and stuff. It was at that point that we started to offer up selling, a new hike or a more extreme hike, an extreme bike ride and other things that they might be interested in. Now they are working on at-home coaching. When they go home can we help them continue the weight-loss program. It is back-end revenue. I will tell you, they have only gotten into one or two of these r recommendations and they are swamped.

Michael: That is great. Now you did mention when you approached them that you asked them to hire a marketing guy to implement all of these opportunities.

Richard: So much opportunities.

Michael: So is that a good strategy? Let's say that there are consultants out there and he meets with a company like Fitness Ridge. He could either sell the execution or sell the projects where the consultants can execute, but could it be a good strategy for a consultant to advise them to bring on a marketing person and still collect consulting fees?

Richard: Sure. Yeah. The reason is if you can get help then all the better, especially help that welcomes your help. That is why this worked out so well. They welcomed the help, but they knew that they were missing. Many times as a consultant you will find people already on staff that you can redirect over to the marketing effort. So sometimes the assets are already there. It wasn't here.

Michael: That's good. Just thinking about this, I think this is a wonderful strategy because when you are selling your consulting services there is no doubt that your client has got to do some work on their part. There is a big chance that they may not want to do it or they are too busy in the business. I can see that as a pretty solid thing to do and to

recommend to your clients to either allocate some labor within the organization to handle all the execution of the marketing tactics. You can kind of remain more in a consultative position and take some of the workload off of you.

Richard: Yeah. It kind of goes along with what I said earlier. That is that you kind of need a champion in the company that is with you. The more that you can do that then the more chance that you will have of success. This champion can be someone they hire to work with you. It could be someone already there. It could be the owner. I have a client right now that we are struggling with because the sales people haven't caught the vision so the owner has. He is forcing these changes. He is forcing these mindset changes. So I have the owner as the champion. He is starting to say, "You know I just found out that I have order takers. I don't have anyone that can sell anything." He is seriously beginning to contemplate whom he has to let go. Those are okay things to start to go through because they have just been getting by with incoming orders from current customers. Yeah, if you can get a champion on your side then it is all the better.

Michael: Let's talk about the Dakota Machine. Tell me who they are. How were you introduced? How did you get them as a client?

Richard: Dakota Machine came through the manufacturing extension partnership and they again, came to a workshop, followed up with a complimentary consultation and I closed them on four projects.

Michael: When you close on all of these projects, are you ever closing where they pay for all the projects at once or generally you are always doing it that they pay as you go?

Richard: Yeah. They generally have been pay as you go because they like the idea that they could stop me after step 1.

Michael: How much did you charge on these projects.

Richard: These are all between \$3,000 and \$4,000 a step.

Michael: Okay. What were some of their challenges?

Richard: Here you had a company that had a salesman making cold calls. They specialized in smaller machine parts. The salesman had gotten lists and was making calls. That was an asset. We knew we had. The salesman was open and he was willing to change and willing to make changes. We got a USP. Many times in manufacturing, one of the

biggest issues and problems and voids in the market is getting product done and delivered on time, what they refer to as lead time. We determined that in step number one they could guarantee lead-time or they would pay the shipping. That became the script for the salesman. Another thing we found that the salesman was not doing is that he wasn't qualifying very well. So he was talking to a lot of manufacturers that would never have the specialized machine part needs that Dakota Machine did. He was wasting a lot of time. In step 2, when you have a USP, you begin to train a salesman on what he should be asking to qualify for to determine if he wants to spend more time on that lead. His conversion rates shot up 20% to 30%, just in 60 days. We have now this little machine company at capacity and they are bringing on a second and third shift.

Michael: Is he still doing cold calling, but he is calling?

Richard: He is still doing cold calling.

Michael: But he is not wasting his time.

Richard: That is right. The material being sent out has our USP. So his conversion rates are going up because we have been upgraded to USP.

Michael: How did the USP rate?

Richard: A partner and profit is the slogan and guaranteed lead-time. When we tell you it is going to be shipped, it will be shipped.

Michael: So through the USP project, talking to his clients, talking to him, talking to.

Richard: Talking to the competition.

Michael: You found the biggest frustration out there for buyers of these small parts was lead-time?

Richard: That's right. What happens is that a company needs a part and they need it in good time so that they can make their part and sell it. So they call up all of these machine companies and say, "Can you make these parts? How fast can you do it? When will you have it done? What quantities can you have it done in?" These machine companies say, "Well, I don't know when we can get it done. It will be three weeks and they end up six weeks and it is pissing everybody off." Dakota Machine had done a pretty good job of knowing how to get it done on

time. So the USP wasn't a huge operational issue because I have another client that is an on-time USP and they can't do it. So they have to back off. Sometimes you get the assets right and they can do it and sometimes you don't. Dakota Machine was able to do it. C Companies call them and they want to know that their parts are going to arrive on time so that they can finish making their parts and selling them.

Michael: Did you guys find a lot of incompetence in the industry?

Richard: Oh yes. It is rampant. There is a lot of incompetence in that area of the manufacturing industry because they have just gotten casual over the years. So they don't have to get them out when they say they will. So they haven't.

Michael: So Dakota could even sell their parts at a premium? Price really wasn't an issue.

Richard: That is right. That is the important thing Michael, that we are getting people off of the price.

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Richard: Which has dogged the manufacturing industry for so long. So when you guarantee lead-time, you can hold your pricing better than you were before and convert 20% to 30% more.

Michael: Dakota Machine, that is a great illustration on USP. How about Sue Steam? Who is Sue Steam? How were you introduced? How did you end up getting them as a client? How many projects did you sell them on?

Richard: I will tell you that this is probably one of the neatest experiences with a client. Let's see, again introduced at workshop with the manufacturing group. Then we went and did our complimentary consultation, opportunity analysis and closed them at \$6,000 a step for 4 steps.

Michael: How did you determine that they were going to pay \$6,000 when you compare Dakota Machine? Where do you make that evaluation?

Richard: That is a great point and that is because you have a \$10,000,000 company compared to \$1,000,000 company. That is the first consideration. I also learned that they were spending \$50,000 a month on advertising and marketing. So they were huge investors in that

area. I knew that we could find money that they were spending wrong and help them reallocate it over to me. That is why I felt like I could ask it.

Michael: What did they do?

Richard: They signed on. We closed it.

Michael: What kind of business were they?

Richard: They make pressure washers for construction industry, for oil and gas industry when there is an oilrig out there in the middle of the ocean they have to clean them up. These guys make the pressure washers that they use out there to clean these rigs. Very good company has been around a long time, a lot of assets, a lot of good distributors around the country and Canada and foreign areas that sell their steam machines. So we got started and the reliability became the USP again.

Michael: Sorry to interrupt. I want to ask you. If you have a \$10,000,000 company, whom is it that you met with? Who is it that is the decision maker on a \$10,000,000 company?

Richard: Well we had an owner and we had a marketing director.

Michael: You had the decision makers there?

Richard: Oh yeah. I can't emphasize that enough to all of the HMA consultants. If I were to look back, and that is why I don't make the mistake anymore, you just don't go visit the company unless you have the decision makers sitting in. The likelihood of my closing anything just drops significantly. Any ways, they were there, the two key people that I needed to have there. They looked at the agreement for quite a while. I held the pricing at \$6,000 and they finally came around and signed up. We took them through 4 steps because step 1 was USP, which again went to reliability. I used the same packaging in USP in this company as I did with Solid Comfort. That is what these HMA consultants need to understand is that I charged twice as much and was able to use the same experiences and the same USP.

Michael: You didn't have to work the whole USP? It was done?

Richard: That's right, but they didn't know it. They don't care. That is what is great about the consulting business. It is when you see parallel situations that you can capitalize on and leverage and charge twice as

much for and get the same value then it is a great opportunity. We did much the same thing. We came up with the reliability certificate mailed out. However, we did do some hard work no this one in that we did come up with a return on investment comparison between a Sue steam machine and the competition. We learned in our USP project that the Sue steam machine lasted much longer out in the field than the competition. We put together a little return on investment chart that showed how much money that our clients were saving by buying Sue steam machines. I guess that I should say I probably did a little bit of work on that one, but that was key in helping us to integrate this reliability is to get this free report together. Now it is being offered on their web site. It is being offered by all of the distributors. It is this free report showing how a Sue steam machine makes more money for our customers than any other steam machine out there. That was a lot of good stuff that we got. Now the sales people, there are four of them; inside sales people. They are now sending out the free report before they give a bid. They are now having the dealers on the other end that are working with the end user use that free report and that ROI analysis as part of the bid process. That was huge integration in step 2. It is getting those inside sales people sold on this ROI report. Then step 3, the database distributors; we started to get them using the report. We started doing more training around the USP and the report. Alliances were more working with distributors and having them do more marketing on their end. We went through the four steps and that finished about a year ago. I got an email from Jack Finger, the owner and he said, "Richard, I just want you to know that we are having a record year because of our USP and because the sales people are qualifying better and not wasting time on bids that we shouldn't be selling." See guys a good USP that is what you want to have, is qualify out people that they shouldn't be working with. What was happening is Sue Steam was getting drained. Their engineering department and their drafting and design department was getting drained by bids that they should not have been doing because they were all price oriented buyers. They didn't care about an ROI with a steam machine. Once the ROI reports started getting used by the sales people, for example a guy would call and say I want a bid. The sales person would say, "Before we do that bid, I need you to read this ROI report. Let's fill it out together and see the advantages of our machine." Guess what would happen if they didn't fill it out?

Michael: You would never get back with them.

Richard: No bids were given. Saving time and that huge waste of energy doing bids that were going to go to a prospect who didn't care about the Sue machine. All of a sudden our conversion rates are going up. He sends

me an email saying, "We are headed for \$8,000,000 to \$10,000,000. I just wanted to let you know that we are having a record year. I would like to do now steps 5, 6, 7, and 8."

Michael: At \$6,000 a pop?

Richard: That's right.

Michael: That's nice, \$6,000 times 8 is \$48,000.

Richard: Yeah.

Michael: That is wonderful.

Richard: That's from one client. That is the fun part of it. It happened because we were able to get the sales people shifting their paradigm away from "Oh, you want a bid? Sure we will give you a bid."

Michael: Those alliances are just handing you money.

Richard: Yeah. I mean this manufacturing alliance has just been terrific. I have not had to do any direct marketing in five years. I also want to maybe make this point. The reason these clients, sure they are referred to me so that helps, but you still have to go in and meet them face to face. You still have to help them see the money from their assets. If they don't sense that there is money sitting in those assets, they are not going to make a \$6,000 investment for the first step. Okay? You have to help them see. For example with Sue Steam, I would ask, "Jack, do you know the closing rate of the sales people?" He didn't. So I said, "It is likely that we could increase that sales conversion rate if we got a good ISP and trained the sales people in that USP." He goes, "Yeah. I know we are spending too much time with people that we shouldn't be spending with." So he saw the money draining out of his company. When he sees that he is going to pay you to stop it. I can't emphasize enough how important it is that you understand the opportunity analysis process. The whole reason for that process is to show them the money because if you don't do that, you are looking like and will be regarded as just another traditional marketing guy. These people are done paying for that. So it is the USP that we have as HMA consultants that is critical. That is that I am going to help you find the money currently sitting in your business that we can uncover and increase sales. You know, Jack, I am not going to ask you to spend any more money on traditional marketing activities. Does that sound like something that would be of interest to you?

Michael: That's great. Engine Rebuilders. The same situation, how did you meet them? What did you close them on?

Richard: Yeah. It is the same manufacturing workshop, the same opportunity analysis, and \$3,000,000 or \$4,000,000 company. They remanufacture engines for the skid steers like Caterpillar and companies that make these skid steer machines that are heavy load lifters and things. Instead of buying a new engine, Engine Rebuilders would do just that. The skid steer owner would send in the old engine, they would rebuild it and send it back out. We went through two steps is all on this one because it was a fast one. I didn't see a lot of work that we needed to do. I didn't see a lot more assets that we could exploit. We did a USP that extended the warranty on the engine longer than the competition so that the repairs and the rebuilding were better because of that warranty. That was our USP. Then we just started to integrate that with the two sales people who was the owner and another one. They just took the survey from the manufacturing group. They have gone from \$3,000,000 to \$5,000,000 in a year.

Michael: Just by changing the USP?

Richard: Yeah, that's it.

Michael: They were just another engine rebuilder. They had nothing making them unique?

Richard: That's right. I think we went to a 7-year warranty instead of a 4-year warranty. They are fine with that because they knew that they weren't going to replace them any ways.

Michael: We are talking differentiation?

Richard: Yes we are. We are talking about a warranty that is longer than the industry. Then all we had to do was get the owner and another sales person using that and promoting that. They had a newsletter also that we started to send out to Caterpillar dealers. Once the dealers know t that they can sell a company that has a better warranty, and then they are going to start selling your rebuilds more. That was a great experience.

Michael: Shocker Hitch.

Richard: Shocker Hitch. Oh boy. It was kind of a new start and again came from the manufacturing workshops. This guy had invented a hitch for the back of the truck or larger vehicles that eliminated a lot of the wear

and tear that a trailer would put on a hitch in a truck; just a better hitch. Here the USP wasn't as big a factor as the sales training or step number two.

Michael: First of all, how did you meet them, same circumstance?

Richard: The same circumstances, workshops with the manufacturers. I came to a show that he had a booth at. I followed up with an opportunity consultation just like the others, but not a huge project. The reason that I wanted to discuss it was to show the impact of some important sales training. He was running ads in some industry magazines for his hitch. He was getting calls, but he wasn't converting them. The ad described his USP pretty good in that the hitch would make it quieter than other hitches and would be a very high-quality hitch. That was okay, but what we had to work on was "A" when a guy calls in what are you going to say to him? How are you going to close him? Because we learned and listened to his pitch and he wasn't asking for the order like he could.

Shocker Hitch is a case study of just some good simple sales training. We took him through and he had a good 30% increase within 30 days. He was just ecstatic.

Michael: How many projects was that?

Richard: That was two.

Michael: How much were they?

Richard: They were \$3,000 each.

Michael: Wonderful.

Richard: He got an increase in 30 days because it was fairly simple. That is how do I handle a call. What do I say? I will tell you to an HMA consultant that is huge. It is probably a bigger source of asset than any other. It is what is happening right now to a prospect. How are they being sold? Is a USP being communicated, number one? Number two. Are they being sold? Are they being handled right? Are they being followed up with after the conversation? Step two, as you remember, is to sell training that is required. Sometimes if it is a larger company, you could charge separately for that project and probably need to work it a little harder, but in this case this was just a one-man show.

Michael: Just clarify step two is integrated into the USP, but within that it is just sales training and getting the sales people to deliver that?

Richard: That's right.

Michael: Good illustration Richard. Now we have Diamond Mower. Tell me about Diamond Mower. How did you meet them?

Richard: Again, through the manufacturing alliance. We went and gave them the same opportunity analysis. I guess, Michael, I don't know what to tell you. All of these are happening in the same way, but isn't that what HMA guys wanted?

Michael: That is what you want. You want one alliance to feed you business.

Richard: You want a system. The system is I will do a workshop. I will follow up. I will do an opportunity analysis. I will do a proposal and close. Workshops, follow up, do an opportunity analysis, show them the money, and close. The same thing. I want them to understand that this thing works.

Michael: A lot of your clients, some you are selling one project, some you are selling two projects, some you are selling four projects, some you end up selling eight projects. Can you take the pressure off of the HMA consultants where there may be a lot of pressure where they think that they have to sell four projects at a time or all eight? Give them some advice about being flexible and open and when they are meeting with the client they don't have to sell all of the projects.

Richard: That is a great point. The system is designed to be manipulated for the client. The client situation, the client assets should dictate to the consultant what steps of the system do I need and do I want. So that is the way it is organized is to be manipulated by the consultant to meet the needs of the client. Not only meet the need of the client, but give the fastest impact and that is why I will say steps one and two can be for ever the only steps that HMA guys can ever develop and do. He will have impact after impact after impact.

Michael: Okay. Typical HMA consultant, at least I would think and when I first started doing HMA I thought the USP and integrating was a slow impact. That maybe up selling and cross selling to a database would be faster. How do you feel about that? Can USP be faster than something like that?

Richard: Great question. It can be. It usually is when a company has been around a while and the leads are flowing. In other words that is the big asset is that they are generating revenue already. The leads are coming in. The salesmen are working.

Michael: Changing the USP to an existing business with the flow of leads can be very fast?

Richard: That is right. Integrating it though is critical because so what if you have a USP. If the salesman doesn't sell it, it won't have an impact. The integration has to be successful and that is why you have to get the sales people on your side. You have to find that champion. Once those things come together, one and two can have powerful impact. In fact you know all of these case studies. Sure we did database. Sure we did alliances and they helped, but they weren't and aren't as immediate unless the situation is that you need more leads. There are alliances or database steps that can get you more leads faster. Again, it is what is the situation of the client. I just want to tell the HMA is if all they did was one and two, you can have a great career because that is so lacking out there. It is such a big void.

Michael: All right. Let's do Diamond Mower.

Richard: All right. Great little company, they just got their survey from the government. They are up \$1,000,000 over last year.

Michael: What do they do?

Richard: They sell lawn mowers that are used by vegetation county managers on the sides of the roads. When you are driving the freeway and you see these guys mowing lawns on the side of the freeway, it is probably a diamond mower.

Michael: Yeah, those big ones.

Richard: Well they had gotten the rights to a mower that automatically applied the herbicide to kill the weeds. So before what would happen is you would have to go through and mow it. Then you would have to go through and spray it. So the labor costs were up. Pollution and poison risk was up. Now they had a mower that would cut it and spray it at the same time. This was Diamond Mower's new machine. Well they came to the workshop and we followed up on the workshop. They said, "Richard, I just have to get help in getting this new machine sold. I have a bunch of them and I need to get them out into the market. It is called the Wet Blade." We went to work and the key one here is

alliances. We did the USP. We did the integration. We did database, but alliances were the key. That is they had an exclusive relationship with the herbicide provider, the company that provided the herbicide for the lawn mower to spray. This company, the herbicide company had been around a long time before this new mower came out. So they already had county people in their database. All we were doing was introducing the new mower to an existing database and formed an alliance with the herbicide company.

Michael: How big of a database was it?

Richard: Thousands of county people. These county people had already been buying herbicide remember. They have been buying poison to spray and they have been buying from this company, which Diamond Mower had set up an exclusive relationship with to use all of their herbicides with their mower. I asked the owner, "Why haven't we promoted to the customers of the herbicide?" His jaw drops and he says, "Duh." So we got a letter going from the owner of the herbicide endorsing the new Diamond Mower to his entire database. We started selling Diamond Mowers. That is a great alliance story for HMA consultants to see how simple this is. Why didn't the owner see the customers of this herbicide company as his prospects? Because he doesn't think that way that is why we are hired.

Michael: He is too emotional. You can't see it when you are in it.

Richard: Yeah, you can't see it when you are in it. So we had to help him step back and help him look at his assets and see them in a different way.

Michael: Horn Plastics, same story. How did you meet them? It is probably the same system.

Richard: The reason I listed this one is because I want the HMA consultants to understand that they can do group training and have impact. Shocker Hitch and Horn Plastics were in the same group that I met with on a weekly basis, taking them through the manuals. They are doing it on their own. This isn't a face-to-face. This isn't me executing. This is group training.

Michael: How much did they pay for these group trainings?

Richard: They paid \$500 per employee. So if we had 10 employees from the companies coming to this group training.

Michael: How many weeks was the group training? How long did you?

Richard: It was \$5,000. We went for 4 weeks, two hours a week.

Michael: What time did you do them?

Richard: I did them from 5 to 7 o'clock at night, after the work hour. So I had eight hours invested. Two hours a week for four weeks, getting \$5,000. They need to know that they can do these group trainings. Horn Plastics went through the group training. They did their USP. Here was the neat thing about them that the owner was spending \$10,000 a month. They make plastic liners for the backs of pick-ups. That is Horn Plastics. It is a nice liner and it just goes in the back of a pick up. Well \$10,000 was generating a lot of leads. Three sales people internally not doing a very good job.

In the group training they learned their USP. They went back in step two, week two and they started to integrate the USP into those phone calls. We went through the four weeks of training and \$5,000. I am not hanging around and asking too much about what is going on. I didn't follow up a whole lot. I saw the owner on an airplane coming out of the Dakotas. I asked him I said, "Phil, how is it going?" He says, "My inside sales have doubled, Richard." They just started to, again it was sales training in the second week that we helped them with to integrate the USP. He said, "My inside sales have doubled and I haven't had to increase my \$10,000 budget." That's a great case study there.

Michael: It's a good illustration. When you are doing the group trainings, besides you just lecturing and teaching, how much interaction between your students and yourself during that group training?

Richard: We are going through the manuals together. There is quite a bit of interaction.

Michael: Do you use an overhead projector? Tell me how you organize the manuals. Everyone who comes in, they sit down and they each have their set of manuals. You have your set. Are you using any of the PowerPoints or are you just taking them through?

Richard: I take them through the same workshop that they would of seen in a workshop to introduce the system, but then it is their homework during the week that is critical.

Michael: So week number one, the first thing you are going to do is take them through the PowerPoint presentation?

Richard: Yeah and then the USP manual.

Michael: Then the USP manual?

Richard: Yeah, because the USP manual tells them the four things that they need to do. It is the same thing they have to do that a consultant would of done.

Michael: All right so they come back, week two, and they should of done the four things for USP?

Richard: That's right.

Michael: Do you review on week two?

Richard: Absolutely. Then we go into integration. Then we go into the next manual. Here we went just to core four. We didn't do 5, 6, 7, and 8.

Michael: On week two, you review USP. If people have questions maybe will you give advice on people's USP?

Richard: Yes, for example, Horn Plastics comes back and says, "Okay. How do we get this USP into our ads?" They are running \$10,000 worth ads. So we help them with some headlines, help them with some things that they can put into the ads to integrate the USP. Now their ads are doing better.

Michael: All right. So each participant in the group training, you will cover each one of their specific USPs in the whole group and learn from that experience?

Richard: Absolutely. They share ideas with each other.

Michael: So there is a lot of interplay and discussion?

Richard: Oh yeah. You want it that way. I had four companies in this group with 2 and 3 employees each on average. They were companies that didn't want to afford the one-on-one, but would pay the \$500 over the four weeks.

Michael: From that group training did you end up getting any one-on-one?

Richard: No.

Michael: Okay, we have time for one more case study. We have Shore Master boat covers.

Richard: What a neat little company. They manufacture covers for boats. They have been in business for quite a while. Here is what was important here. Again, they came to a workshop. We followed up with the opportunity analysis. We had a sales director who is in charge of two or three sales people and the owners wanted him to get going and move things forward. I found out that they just spent \$50,000 on a brand new catalog being sent out to all of their dealers; 2008 boat cover catalog. I asked them, "Where is the USP in this catalog?" Of course there wasn't. So again we have a traditional advertising firm that is kind of missing the boat. They are just doing the glitzy catalog without selling anything. I had a problem. I said, "Gee, this is already out. Man, what if our USP can't get along with this catalog? What are we going to do?" So we went ahead and did the USP, but here is what we came up with. Elite partners dealer program. Making it easy for dealers to sell more. We came right back with the USP that said, "We mailed you our catalog. If you sell \$1500 in boat covers, you become an elite partner with Shore Master. An elite partner has a guaranteed turn around. The last thing that you need in ordering for your customer is delay. As an elite partner, Shore Master Fabric will ship your order on the day that we provide at the time the order is placed or we will pay the shipping cost. Everything we offer is at your fingertips. Many other manufacturers say they are the biggest or have the most but Shore Master Fabric is the only one that guarantees the fit of your customers boat cover. If your customer's cover or canopy does not fit, we will make it right at our cost, not yours."

So we began to turn these dealers that got this brand new catalog and we made them Elite partners if they sell \$1500 a year. In other words, do you qualify to be a Shore Master partner or not? We turned it away from begging for dealers to do you dealers qualify to work with us? If you are not an elite partner, then I can't guarantee the turn around on your cover. I can't guarantee zip, but if you want to be an elite partner and you have our elite catalog. We just took the catalog and we positioned it as elite. Does that make sense?

Michael: Yeah, that makes sense. That is good. How has that performed?

Richard: This is a new one. They are just having a good summer. The guy tells me that his canopy sales are outdoing his boat cover sales, so he is excited about that. He says, "Richard, there is no question that just by communicating." What we did was right after the catalog went out, we had all of the sales people call dealers and tell them about the elite

program. He said, “Just by communicating our USP, we have increased sales this summer. That is in a summer where boats are not selling right now.” What he did was, maybe not as big of an increase, although I think over the year it will go up higher, but he has kind of saved his summer. He didn’t have the dip that he was thinking he would have. That is just as powerful and important as increased sales; not losing sales.

Michael: Michael, can Richard give us some advice about the core four from a time management point of view; shortcuts to get the job done quickly, how we can get through each step in one day along the lines of the Day Flannery interviews, tips on becoming more efficient in completing the four tasks in each module of the core four. Thanks and regards, Mark Whitely.

Richard: One thing that will help is if you can get a champion on board. If you can get someone that is helping you with the core four that is good, that will save you time. If you have to do it all, then that is going to be tougher. It really should be that you should not spend more than three to five hours per week, per client on the steps. If you are doing that, then you are maybe doing things that you shouldn’t be doing or that you don’t have to do.

From a time planning standpoint, for example on USP, you meet with the company week one. Again, the system can be manipulated, so if you want to get it done in a day then have your meeting, make your customers calls, look at the competition and eight hours later go deliver USP. You could do that. You don’t have to spread it out over four weeks. You can get it done and package it in a day if you want. Again, manipulate the system the way that will best fit your client’s schedule. The system is kind of built though in the way the market has best responded. That is, wow I am going to pay you \$3,000 and you are done in a day. But, you have been with me now four weeks. You have come in and spent time every week for four weeks. Oh, all right. See it is just easier for a guy to pay \$3,000. The delivering of the system is kind of packaged in a way that we have learned best fits the market.

Michael: Here is a question from Sam, one of our new consultants out of New Jersey. Richard, if I were to drop you in a small to medium sized city with no money, no contacts, and no other resources except for the manuals. How would you get started in finding and acquiring closing clients?

Richard: Along with my manuals, I would have a PowerPoint presentation. I wouldn't go into a city with just my manuals. If you were to drop me off, I would have my PowerPoint presentation and the manuals. I would immediately go to the local Chamber of Commerce. I would say that I have a workshop and I would like to offer it to your customers at no charge. So on the next chamber meeting, I would like to have 30 minutes. Is that something that would work for you? It is a new marketing system idea. I am not going to charge for your clients. All I am going to ask is that I can follow up with them if they are interested. So, boom! That would be the first thing I would do in small to medium sized cities. I would go to that Chamber and I would get a workshop ready.

I would also start to visit maybe a sign company. I would go in and I would bring my manuals with me. I would say, "You know this marketing system has complimented signage for companies all across the country for years. It has helped them add more sales, which is what you want your sign to do for your customer right?" Yeah that is what we want. I would like to add some more marketing and sales training to your sign business. Could we do a little workshop for your sign customers? I would do the same with a CPA. I would do the same with a bank. I would take eight hours for a day and hit those alliance opportunities right off the bat.

Michael: You would ask to be able to be put in front of their customers to do the workshop.

Richard: At no charge.

Michael: We just heard two case studies and that is exactly how you work the system?

Richard: That's right.

Michael: You just take it from there.

Richard: Part of the HMA investment that you are making is that you are buying a system that has been around for 17 years now. You can use those case studies. The credibility is in the system. The credibility of the system is that it has performed. So take the load off of yourself. Don't put it on you. You have purchased the rights to a system so that you don't have to spend 17 years putting it together. So don't get hung up. If you go in to a prospect and the focus is on you, you will sell sabotage. You will become uncomfortable. They will ask you, what have you done? If you go into the opportunity analysis focused on

solving their problem by use of this system, you are going to keep the focus off of you. Then you have all of the credibility you need in the system. I am hoping that helps in how to get things started.

Michael: Here is a question from Pete Perika. Michael, here is my question. Richard do you find one type of business better than another? For example, is it easier to get a retail operation to increase sales faster versus a manufacturing company?

Richard: I would say yes to that. I would say that retail is probably the best. The only reason that I have been focused on the manufacturing is two things. One is manufacturers are having to wake up to marketing. They are about 10 years behind retail, maybe 20 in that they haven't caught on to marketing like they should. Hence, they have been losing business to China and overseas. They are tired of losing it and they are beginning to wake up to marketing. So from an industry standpoint that is why I have loved the manufacturers. They are waking up and they are beginning to get interested and we are here now to help them. As far as I think the quickest impact. Retail is clearly, probably the best because sales are happening everyday, people are coming in everyday, and people are coming in every day. They usually have a good database set up. Maybe they have been doing mailings. They have sales people with idle time that you could work on projects. That is why I would say that retail is probably the fastest.

Michael: Richard are there certain businesses that you try to avoid.

Richard: Yes, avoid start-ups. Don't mess with the startups. They don't have any assets and so they are going to be tough to make. Unless they will pay you to create those assets, avoid startups. Avoid restaurants and franchises. They always have to get marketing decisions from headquarters. Restaurants are just to monitor and track. They have plenty of consultants in the industry, so stay away from those kinds of businesses.

Michael: Hi Michael. It is always great to hear from you and Richard. My question is about Richard's experience with the "done for you marketing". Is he doing any of it for his clients? Managing marketing programs for a fee? I am getting more requests about going this route, but I don't have the fulfillment system in place. Do you or Richard have any experience with this? Dedicated to multiplying your sales. Paul Fled, Marketing.

Richard: It may be that they want you to handle advertising, they want you to handle printing, they want you to handle Internet and all of that and

actually be a fulfillment house. I would caution against that unless that is where you want your consulting business to go. I have stayed away from that fulfillment and I just always instead found it better if I look at the client and say, "Oh. Do you already have an ad agency that I can work with on this?" They go, "Yeah, we would like to use them." You already have an Internet host that handles this. "Yes we already do." You already have a printer that has been printing this? "Yes, locally." Well we can just keep them. Then they know that I am not making money on that stuff number one. Number two it has just been easier to coordinate rather than try to do it all. Three, I have seen two competitors end up really suffering by trying to do both. By trying to execute on the marketing and be the fulfillment. I just caution you on that.

Michael: Here is a question from Jim Peck out here in San Diego. If an HMA consultant wants to focus on three or four types of businesses to specialize in, which ones would be the best ones for systematic cookie cutter implementation or consistent results?

Richard: I would go to retail, but avoid the franchises. Go to independently owned retail stores would be one type. Then I would go to manufacturers that would be my other one. Those would be my top two. Following that would be a real tie between service companies and professionals. I liked working with financial planners and service companies pretty much equal, so that would be the top three.

Michael: That is the end of this interview with Richard. I hope these case studies have helped you in giving you some new illustrations and examples of how to get clients.

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