



TURNING PROSPECTS INTO CLIENTS



Cold Calls and Visits

PAT IYER



www.patiyer.com

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Turning Prospects into Clients Through Cold Calls and Visits

There are many ways to start and grow a business. This chapter describes one way to add cold calls into your marketing plan. Some people find them to be useful marketing and prospecting tools.

The Marketing Mindset

Many years ago when I participated in multilevel marketing companies, I learned the concept of the numbers game, and the phrase, “Every no brings you closer to a yes.” Some people thrive on cold calls. A cold call occurs when you contact a person without having a previous relationship with him. Many people have heard of cold calls, received cold calls, and want nothing to do with cold calls. An understanding of the techniques that convert cold calls to clients can help those who are resistant to cold calls to appreciate the doors this marketing method can open.

Part of the marketing mindset is rooted in recognizing how you as a nurse can contribute to the legal team. Think about what you have to offer to an attorney. You are a registered nurse with years of experience in health care and with medical records. You understand various types of injuries, illnesses, disease processes, and the healthcare system. Your mindset changes from a sales person making on a "cold call" to being a nurse who is going to educate someone else about a process or an injury. You can interpret that pile of records sitting on the attorney's desk that he really didn't quite understand, so that you become very valuable to him in working his case.

Research

Create a list of law firms (prospects) so that each day you will have a different place to try to conquer. Do your homework ahead of time, and to identify the law firm as the kind of practice that can hire you. They should be working on the types of cases that will value having a nurse to help them interpret the records. Make sure that they are not doing employment law or real estate but they actually do cases that involve a personal injury, professional negligence, or a product liability case. Review the Martindale.com listing as well as the firm website. Doing that homework and

knowing who you want to target is important. Create lists of prospects with phone numbers and addresses.

Marketing can consume an enormous amount of resources. A non-targeted approach can end up costing you a lot of money. Be clear about your ideal prospects. Do you want to work with only defense attorneys? Are you targeting plaintiff firms? Do you want to work with firms within a certain geographic radius? Do you want small to midsize firms as your clients? How can you get these answers? Martindale.com has many of the answers.

Your state's American Association of Justice will have primarily plaintiff attorneys as their members. The Defense Research Institute attracts the other side of the bar. Both groups offer annual and periodic educational programs for attorneys and paralegals. You may be permitted to attend their programs. The bar association in your state may also offer local and annual meetings. Investigate these programs and go prepared with your business cards.

Build a relationship with the people who are the most likely to make good referrals to you. Identify those people. Your referral sources may be other legal vendors, attorneys in your social circle, church, and neighborhood.

What is the checklist for a good prospect? Who is a good A level prospect? Check your criteria against the prospect list you are currently using. We have to find out who are the most important people to target and how are we going to get in the door. Concentrate on only those prospects who deserve to be on your list. That may not be easy. Take a look at the clients that you have that are currently A level clients and identify some of the commonalities as to why they're A level clients for you. They may buy the right amount of services; they may buy it at the right price and in the right timeframe. Are they in a certain type of law practice? Are they in a certain geographical area; are the people at a certain level?

Also, what is it about the firms that make them more right for you than others? Are they facing certain issues that would make them need your services more than other firms would need your services? It's almost like taking a pencil and sharpening it until you have a very, fine point. All the shavings fall away and you know exactly who it is who belongs on your list. The people who are on your list should be people you are anxious to do business with.

Once you have your list, dive deeper into the data. You can warm up a cold situation, or a cold call, with some research. You can do some research on a company or a person and make the message much more customized and so the cold call doesn't

feel quite so cold anymore. You need to know what you're going to say when you connect with your prospect.

Do some research—research about the firm and the decision maker. You can Google the firm and find out what's been going on, whether there are press releases that have been sent out not too long ago. Be careful when you Google. Things on the Internet live forever. You may be reading something and it looks really good and it may be from five years ago. So pay attention to the dates.

Targeting the Decision Maker

There is a process to streamlining your way to the decision maker. The decision maker in a law firm may be a solo practitioner, a managing partner or a partner. The first thing you need to do is you need to find out who you're going to target. Once you know who you're going to target, you need to know what you're going to say, which is of course the message. You could be the best seller in the world and completely waste your time if you're calling the wrong people or if you have no idea what to say when you reach the decision maker.

You should study the prospect's firm's website. Be careful with dates here, but you can find out a lot about an attorney this way. You can find out what college that person went to and whether the two of you have anything in common. All that makes for a very good customized message. In the legal world, when attorneys have the opportunity to brag about their large verdicts or their wins, that gets on their websites pretty quick. They also tend to have a profile of every attorney who works in the office with their picture and where they went to school and their area of practice. It is rare to find a law firm that doesn't have a website.

Once you know the kinds of law firms that belong on your target list, the next thing to do is to drop in the name of the correct decision maker. You want to go high in this case. If you're not sure who is the right person, start at that person's boss. If you're not sure who that person's boss is, start at the very top of the company and work your way down. Don't start at the bottom and work your way up. The top attorney in the firm may be identified as a managing partner.

The decision maker is usually a high-level person and very busy. It's really important to understand what's going on in your prospect's work-life that's going to affect the way he or she reacts to you when you call or when you email. This is a person who spends most likely a lot of time in meetings. He or she is meeting with clients, taking depositions, or trying cases. They're looking at their email or they're listening to voicemail so they're very distracted. That's important to understand

when you're leaving a voicemail for somebody. You need to be very clear and concise and say only what matters.

Timing for Making Calls

Time of Day

There are certain times of the day that are much better than others to reach your decision maker – 7:30 AM-9:00 AM, 12:00 PM-1:00 PM and of course any time after 5:00 PM. If you want your decision maker to hear the message without the assistant interrupting, consider leaving the decision maker the message on a Sunday night. That way he or she may come in first thing Monday morning, before the assistant comes in, and hear the voice mail. Your message will say, “If you could go ahead and give permission to your assistant to put a time on the calendar, I’ll call back after 9:00 AM when the assistant comes in.”

Sometimes when you call the assistant after 9:00AM, that person will say “Yes, Tom Smith told me to put this on the calendar”. That can be very successful.

Day of the Week

There's no bad day of the week to make calls. No one day is better than another, no one day worse than another. Try your calls at all different times. Every decision maker has different work habits, a different process that he or she goes through. Record when you make the calls because when you're calling a lot of people; there's no way for you to remember that a month ago you caught them live at 5:15 PMon a Friday unless you mark that down in your database.

In some states there is something in the legal system called the *motion day*. In our state every other Friday the attorneys are in the courtroom if they have motions to argue and there are no trials taking place on those days. You will have a greater chance of reaching an attorney on a motion day because if he or she has no motions to argue, that person's more likely to be in the office. I don't know if all states have motion days, but that is something that legal nurse consultants might want to ask their clients – “Do you have motion days and when are they?” Then once you know the pattern you can plan accordingly in terms of trying to reach your prospects.

Time of Year

There are certain times of the year that are very good in reaching decision makers live that most people don't think about. The first one is August. There are many people who do go away for vacation but no one goes away for four weeks. So if you don't reach them in week 1 or 2, you'll probably reach them in week 3 or 4. Most firm meetings aren't happening at that time so people are at their desks and relaxed.

Also during the week between Christmas and New Year's, a lot of people do go away but not everybody so the ones who are at their desks are pretty chatty. They may not see you that week but if you ask them for a time next year, which is all of maybe four days away, their calendars are usually wide open. People who wait until after January to ask for time on a calendar usually end up waiting till the end of January because the calendar is then filled up.

Frequency

Never give up on efforts to reach your prospect. Unless you learn something about your prospect that leads you to believe he or she is no longer a good prospect for you, keep going. Be persistent, be respectful and be patient and you will get your turn. Your competition will not hang in that long. You know that there are certain prospects that are going to take a long time to reach. But if you get in to see those people and you end up doing business with them, it can be very worthwhile. So if you only have those kinds of people on your list, you better believe your sales cycle is going to be very long. If you have some of those people on your list and some of the other people who are easier to penetrate on your list, then you'll have some that become your clients now. You'll close sales on the others later. But you'll be filling your pipeline with the big ones as well as the medium to small ones that will close a little sooner.

Start at the Top and Work Your Way Down

Set priorities with your prospect list. The most important ones should be at the top of your list. Work your way down. This same philosophy goes for when you're penetrating an organization. Start at the top and work your way down. You will get much further when you talk to the assistant to the partner than you do when you talk to the receptionist.

If you're planning to create a call list, do not start with the A's. Start with right around G or you can start with Z and work your way backwards. Why? Because when your competition did the same thing, they started at A and by D they gave up.

Talking to the Gatekeeper

The gatekeeper may be the person who answers the phone, or the attorneys' secretary or paralegal. Ask the gatekeeper, "Do you use legal nurse consultants?" Use your well rehearsed script. Some of the people answering the phone will refer your question to a legal secretary or paralegal, who may be intrigued and want to set up an appointment for you to meet with the attorneys. Spend a good deal of time with the person who answers the phone right from the very beginning, so that you can sell him or her that you have a value to the attorney. Your goal is to have that person help you set up those appointments.

A lot of people struggle with this and their impression of the gatekeeper is this person is very much like a bouncer. The gatekeeper can be very helpful if you think about what this person has access to. This person has access to your decision maker's calendar and your decision maker. Think about how often your decision maker walks past the assistant all day long. When you have trouble reaching the decision maker directly, contact the assistant and open up communication with that person. Say "If I sent you an email with some information, would you mind sending it to Tom Smith?"

Remember that the assistant is instructions oriented, and task oriented. If you give him a task he will most likely do it. So the assistant will usually say "Sure, send me the email and I'll forward it." And then say "Terrific. What I'll do is I'll give you a call tomorrow and see if Tom Smith said it's okay to put a time on his calendar to come on in and meet with him next week."

Meanwhile, Tom Smith takes a look at the email and if he doesn't, the assistant says "Have you had a chance to look at the email because the nurse said she's calling tomorrow." So the assistant will remind Tom to do this and then the next day the assistant will say, "Is it okay to put the nurse on the calendar because I know she's calling?" You'll get a yes or a no that way and sometimes an appointment without ever having spoken with the decision maker. But that's okay, because remember we did a lot of qualifying before we put the prospect list together. This is how we view the assistant. Not like a bouncer but somebody who's just incredibly helpful for us.

Leaving Voice Mails

The person who answers the phone may simply identify what you are calling about and direct your call to the attorney's voice mail. Be prepared for what you plan to say. Leave a voice mail for the attorney. These people are busy and so it may take some time to get on their radar. Be respectful; be politely persistent. It's almost like being a constant presence in this person's work life until this person is ready to get on the phone with you.

When you leave a message, there are two pieces of the message that are important. The first one is content. The content has got to be relevant, compelling and in language that resonates with the decision maker. You also want to tailor it to your target audience.

Delivery

The next piece of the message is delivery. This is the one people tend to overlook. They do spend time on the content but sometimes they forget about the delivery. Delivery is very important; modulate your tone and cadence and most importantly, be conversational. How do you sound when you leave voicemails? Leave 10

voicemails for yourself. After each one, pick it up and hear how you sound and pretend you're your prospect – busy all day long, just came back from three meetings, about to go to a few more and distracted.

What's coming through? If you were your prospect, would you give you a meeting? And if the answer to that isn't yes, you need some more work. Here are some tips on how to be more conversational. The first thing is you should have your sentences you believe are the most important in front of you. You should know them well enough that you don't have to read them. If you're finding that you don't sound conversational, flip your paper over and don't read from the paper. If you still find that you're not as conversational as you'd like to be, stand up and get some more air going through your body; sometimes that changes everything. Prepare ahead of time. Write your script and practice it over and over until you can say it flawlessly. Practice in front of the mirror, practice with your spouse, children, or pet. Practice in the car.

If you are still not as conversational as you want to be, talk to a mirror so it looks like you're smiling. Or put a picture of somebody else on your wall. You can pretend you're just talking to somebody else. So now you sound very conversational as opposed to sounding practiced and rehearsed. Once you're ready, rehearse until it doesn't sound rehearsed.

Structure of a Voice Mail

Here are a few models for leaving voice mails.

Sentence 1: Say your name and your company name.

Sentence 2: State in one sentence exactly what you do, in language that's relevant and compelling to the person who hears it. Sometimes we have certain phrases and certain words that mean something, but then if you switch the order all of a sudden it's very powerful. Play with those words until you have a message that will matter to the person who hears it. It's not always what describes your business best, but it is what's going to get you through the door. Nothing else matters.

Sentence 3: Your expertise and credibility – this is your sentence number three. Why is it that what you do is so impactful and incredible for the people who hire you? Why do they hire you? Why do the clients say yes to your services? That's usually the basis of statement of expertise and credibility.

Sentence 4: State why a meeting would be a benefit to the decision maker. Let's make it easy for that person to understand why a meeting would be useful.

Sentence 5: Give your phone number with spaces in between the digits.

Sentence 6: Provide the close.

A sample message: *“Hi Bill, this is Pat Iyer and I’m calling with Med League. We supply well-qualified nursing experts to help plaintiff attorneys settle their cases. I’d like to get some time on your calendar to talk about how we might be able to do the same for you. If you could call me, I’m at 908 788 8227. I’m looking forward to speaking with you soon.”*

That’s an example of a voicemail message we would leave. It’s friendly; it’s conversational; it’s impactful. There’s a statement of expertise and credibility there and this is what will make a difference. We already know that content and delivery is what’s going to hit your target.

Here is another format for a voice mail. Here are some strategies from Colleen Stanley, who shared them on a National Speakers Association CD, for getting your prospect’s attention.

1. Introduce yourself. “Hi (name of prospect). I am with (name of your company.)”
2. Refer to some event or problem that makes them a good prospect for you. Perhaps something happened to make them in need of your services. You can obtain this information by being aware of industry trends, changes, regulations, mergers, the information on the company’s website, or through your referral source. “XYZ regulation that goes into effect on (date) is creating the need to ____.”
3. If you have a name of a referral source that the prospect is likely to know, you can use this. “Mr. (name) suggested I call you to...”
4. Identify your value statement. This would encompass the benefits to your client of working with you. This may be your elevator speech. “I specialize in working with law firms like yours by helping them to (benefits of what you deliver).”
5. Add social proof. “We’ve helped (names of clients, if you are permitted to share this) in a similar situation to obtain these benefits (explain them). What they received was (specify.)”
6. Conclude the call by identifying when you will call back and also leave your contact information.

When you do your business development calls, close your email, close your cell phone, close your door. Turn off everything that would be a distraction and keep your eyes on your prospect list and where you left off because having time live with a prospect is like valuable real estate and it doesn't come along very often. Look at all the work you did to get here to this very moment. You have to make the most of it. So make sure that you're focused and you know exactly what you're going to say.

Mailing Information Followed by Calls

Assemble your materials: a business card and a resume that emphasizes your nursing knowledge, and all of your years of nursing experience and what you have done in the field.

Should you send out informational packets first, followed by a call within one to two weeks OR call potential clients first? There are two parts to that answer. Most typically you will place the phone call first. Leave one to two voice mails before starting to email. Your email follows up the voice mail and has a few sentences, a couple of bullets, and a close.

Don't send out a packet and then wait two weeks. There's no reason to wait two weeks. If somebody asks for information send it by email, which is really the quickest way to do this. People are expecting that these days. A couple of years ago the packets were still going out, now it's more email than anything else.

You can follow up within 24-48 hours of sending an email. But if somebody asks for information you need to send it out by the end of that business day. A lot of people will wait on that. Don't wait because there's a continuity to business development. That person will remember asking for that packet or that email and when the person gets it the next day or he'll get it later on that day, he'll remember you and then a day later you call to follow up.

Now when you do call to follow up, don't say "I'm just calling to follow up." Instead, say "I'm calling to be sure you received the information you asked me to send and to set a time to come in and talk to you in more detail." Because remember what your objective is, it's to get in the door. So we want to keep the language consistent with what your objective is.

When You Reach an Attorney at the Law Firm

Let's say you reach the head of the firm. This person is responsible for finance, case management, and overseeing associates and more. So when you call and you want to talk about something that has to do with getting your foot in the door, the attorney

may be facing getting ready for a trial next week. How much time and attention do you think you're going to get from this big decision maker? Probably not much at that particular moment and you could, of course, understand why, because what you're calling to talk about is not half as important as what that person is dealing with right now.

But that doesn't mean that this person shouldn't know about you, because it's the decision maker's inherent responsibility to maximize the price value relationship for anything she buys on behalf of the firm. Your product or service is one of those things. But you may just have to wait a little bit to get this person's attention. Have that empathy when you call if somebody is knee deep in something else and say, "You know what, I get it. You're busy, I've had days like that. How about I call you tomorrow?" It will do wonders for your relationship instead of forcing a conversation on somebody at a time when he's just not ready to say yes to you. That is not going to help your relationship with that person. So hang in there and wait a little bit; be empathetic.

If you get somebody on the phone and he's really rushed and speaking very quickly, it is a natural inclination to match the cadence of the other person's voice and for you to speak quickly too. Don't do that. Slow down. He says, "I can't talk to you right now!" You can say, "Wow...you sound really busy..." and sometimes he'll slow down and take a breath and say, "You have no idea!" and then proceed to tell you everything he's busy with including what you can help him with. So slow down the cadence of your voice.

I used to ask attorneys, "Did I catch you in the middle of something?" Finally one attorney said to me "Pat, if I wasn't in the middle of something I wouldn't be doing my job." So then I switched the question to, "Did I catch you at a good time?" and that has proved to be a much better question than the other one. Most times people will say "I have a couple of minutes." People usually have pretty good behavior when they're at work. When you call them at home it's a whole different story.

We would rather have two or three more touch points that are good ones for the decision maker before we get the meeting than to force the meeting on somebody who really isn't ready to say yes right now. When you finally get to that meeting the whole relationship will start off in a much better way. Securing the meeting is the critical point of the call. Don't lose sight of this. After all the effort you made to decide who to target, what to say, and how to overcome objections, be sure you ask for the meeting. Identify what your objective is in any communication touch point. As you're going back and forth with the person on the phone, make sure you keep an eye on what your objective is so that you get the outcome you're looking for.

When somebody answers the phone live, you can't read all those voicemail sentences that we just talked about because it's not conversational. Say your name and your company name, the one sentence of exactly what your company does and a question. Now this question should not be left up to chance. You should think about this ahead of time. If you are marketing expert witnesses, you might ask the attorney, "How important is it to you to work with well-qualified expert witnesses?" or "What keeps you up at night with regard to expert witnesses?" If you are marketing screening medical malpractice cases for merit, you might ask, "How important is case selection to you?" If you are marketing medical record chronologies and summaries, you might ask, "How easy is it for you to interpret medical records?"

What questions can you use that are going to be relevant and compelling? If you do reach someone live, what is the question that's right for you that's going to springboard that conversation? Think about all the different possible answers to the questions. And if you're not getting the answers you want then you need to change your question.

Overcoming Objections

You get into a situation where you've identified the person you want to speak with; you have the message; you get her on the phone. You engage her in dialogue and now she gives you an objection, and you can't overcome it. The whole situation stops. You should try to anticipate the objections that you're going to get from your prospects. If you think through all the objections that you've gotten over time, you probably can identify about 95% of the objections that are going to come your way. And if you do that you can also pre-think what those responses are going to be. Write down your two most difficult objections, the ones that really stop you in your tracks, make you hit a tree, and craft answers to them.

Here are some common ones:

- I have a paralegal. I don't need a nurse.
- I use my next door neighbor, who is a doctor, to review my files.
- I have a nurse in house.
- I already use a legal nurse consultant.
- I am tremendously busy and cannot see you now.
- I don't do medical malpractice.

Once you've identified what the responses are, practice responding and don't forget to couple the answer to the objection with a request for a next step. For example, if somebody says, "Send me information" this could be a brush off but sometimes it's not. You can get the appointment today without ever sending the information and it sounds something like this –

"Send me information."

"I could do that but our information is very general in nature and I'd like to speak with you about how this applies to your work. How about let's put a time on the calendar for next week Thursday at 10 and I'll bring the information with me. How does that work for you?"

You answered the objection and coupled it with a request for a next step. When you do that you're more likely to get a next step. Think about your decision maker. What is going to allow you to overcome that objection and get you to the next step? Practice your responses. Write down the objections and craft answers and make sure that your answers are strong so that you don't get stuck.

Fitting in Cold Calls

How do you fit business development calls into your busy schedule? Schedule a time block that it is just as firm as if you were at a meeting with a prospect. You would never cancel one of those. Consider your cold calling time at that same level of importance. Don't accept any interruptions.

When you are really busy, reduce the size of your prospect list. Let's say you only focus on the ten most important prospects to you. If you can't focus on the ten most important prospects, narrow it down to five and call your five most important prospects. And if you can't focus on your five, if you can't find time in your work week to call five people, rethink your desire to earn more money.

Your Progress

Create goals for how many attorneys you will contact each day. Track your progress. Whether you use a sophisticated system like [salesforce.com](https://www.salesforce.com) or Goldmine or ACT! or whether you're using an Excel spreadsheet or whether you use a plain old piece of paper, the best tracking mechanism to use is the one you use consistently. Take diligent notes about everything your prospects tell you. Keep them in your tracking mechanism so that the next time you call someone you can look back on where you left off. Talk about that when you communicate with them next time, whether it's a phone call or an email.

At Med League, we implemented a system a couple of years ago in terms of tracking progress. When an attorney contacts us, we fill out a new file intake form and gather specific information and have a checklist on the back to make sure that we have followed through on all the steps. We file these forms, which are printed on orange paper to make them stand out, in a binder alphabetically by the attorney's last name. If the case comes in, we take out the orange sheet and place it in the case file folder.

We also maintain an inquiry binder. We use a loose leaf binder with paper that is printed with a table. Its columns list the name of the attorney, the name of the case and the name of the expert that we referred, if that's the situation, and a column for the date. Every week we pull open that binder and make the follow up calls and use our ACT! database to keep notes of what was said. We record if the attorney is going to use the expert or if he said the case was on hold or "speak to me again in a month". This system keeps us very organized and visually on target in terms of who we need to be calling each week. We use this system consistently.

Unscheduled Visits to the Law Firm: Cold Visits

I have described cold calls in this chapter. Now I will discuss cold visits. Consider walking into a law firm without an appointment. Fit this visit in between your own appointments. Use a giveaway you have created that has your name, website address and phone number on it. Go in and say, "I'd like to speak with a paralegal" because the paralegal has that attorney's ear. She may be able to get you in to see the attorney where the receptionist may not let you. Not all firms have paralegals. Or you can ask to speak to the attorney or his legal assistant. Once you are past the receptionist's desk, tell them you have this gift for them. You wanted to let them know you were in town and would be happy to meet with them. Then try your best at that point, with that assistant, to get the one-on-one meeting with the attorney. Once you get the one-on-one attorney meeting you have to focus on what it is that you can do for the firm.

Here is another approach to unscheduled visits. You may have three objectives when you walk into the office: a) leave your card and resume, b) introduce yourself and ask for an appointment to come back to meet with the attorney, or c) ask for the attorney's time while you are there. When you walk into a firm without an appointment, your main goal is to make sure you leave your business card and your résumé with the front office person, whether that is a paralegal or a secretary. Introduce yourself and ask for an appointment to come back. Making that initial icebreaker with the front office, with the secretary or the paralegal is important and is a way to get your foot in the door. So the whole cold calling process need not be as scary if you know why you are going there, know what you are going to say when you get there and are prepared if you do get to talk to the attorney. You will know your objective is to discuss the benefits of working with you.

If you have an opportunity to meet with the attorney, you may encounter the objections I listed earlier. You can turn this around by asking the attorney for his assistance since he was so well known in the area. What advice would he give you to get a business such as yours up and running? In the process, you will be explaining your services and subtly selling the advantages of working with a nurse in addition to paralegals. You will be explaining to him how you will help his colleagues, but you are really trying to convince him of why he would hire you. As a legal nurse consultant, you can do so many of the pieces that his paralegals were not doing, nor were they trained to do because they weren't nurses. As an added benefit, the attorney will be teaching you all the things that his paralegals are doing for him.

Getting Acquainted

Prospecting includes a getting acquainted stage. Are you a good match for this prospect? At this time your goal is to learn as much as possible about your prospect because you may never have the opportunity to sell your services to that person again. You should also assess whether the person is a good match for your business. Communicating your competitive advantage begins in the getting acquainted stage. This is when your prospect is looking at you and comparing you with the competition. Your goal at this stage is to show how you can satisfy the prospective client's needs better than your competitor.

Establishing Rapport

A comfortable connection with a prospect helps to make a sale. This communication extends even further to how you present yourself. Neurolinguistic programming theory emphasizes that people like others who are like them. This theory suggests that you should blend in and mirror (match their body actions) of your prospect. Have you ever had the uncomfortable experience of being dressed differently than others at a gathering? If you're at a barbecue and everybody's wearing jeans, you should be wearing jeans. But if you're at a meeting where everybody's wearing a suit, you need to wear a suit. Your image needs to mirror your prospect. You cannot go wrong if you are professionally dressed when you walk into a law firm.

Look for areas of commonalities. As discussed earlier, research your prospect before meeting with him or her. LinkedIn, your prospect's firm website, and internet searches may yield a wealth of information about your prospect. When you integrate this knowledge into your getting acquainted stage, your prospect may be impressed that you took the time to learn about him. When you've gathered the research, use that to establish rapport.

Communicating Credibility

There are a number of ways that you can establish your credibility. You communicate your level of professional expertise by all aspects of your branding: business card, letterhead, email address, website and signature lines.

Communicating your competitive advantage and expertise can be accomplished in subtle ways. You may refer to work you've accomplished with clients, your educational background, your publications, or other strengths that set you apart. Figure out what competitive advantage you have, and then make sure to bring that in the conversation.

Goals of Face to Face Meetings

Your goal is to make a sale. This requires a positive mindset. What you focus on is what you get more of. So if you want to focus on the idea of growing your business, then that's what you're going to get. The people you consult with need your expertise. It's a matter of building the relationships and making the connections that are going to result in business.

The getting acquainted stage focuses on determining if you and the prospect have a good fit. Ideally you can achieve a face to face meeting to explore the opportunity to help your prospect and convert her to a client. This stage helps you decide if you should close the sale. Here are some questions that help you reach that decision.

1. What does the prospect need? What prompted the client to contact you, if he or she initiated the contact? What is the client's urgent need? Some people refer to this as the "what keeps you awake at night?" question.
2. Does the prospect need what you have to offer? Are you the right person to deliver these services, or should you refer the prospect to another person? For example, your prospect may ask you to do a life care plan. This project requires specific training and should not be taken on by a legal nurse consultant who is not familiar with the responsibility. Instead, you may offer to locate a life care planner to assist the prospect, and then to focus on what you else you can do to help.
3. Do you find that the prospect can communicate well with you or are there barriers that will be difficult to overcome?
4. Do you get any strong negative signals from the prospect that would make you hesitate to consult with that person? For example, is the person negative or abrasive? For example, an attorney asked me to meet with his team to discuss my services. He slouched in the chair and told me that everyone wanted to get into his pocket. He dismissed a sample report I did as "sophomoric", although his associates assured me they thought it was very effective. He told me he would have sued a legal nurse consultant who gave him an ineffective expert, but found out the LNC had no insurance. When I left his office, I had a pounding headache. I talked to a few people whose judgment I trusted, and found out this attorney had a string of legal vendors

who no longer wanted to work with him because of his mood swings and cash flow issues. I wrote him a polite letter stating I was too busy to take on his work, and I have steadfastly refused to market to him ever since.

5. Does the prospect have the resources to pay for your services?
6. Is the person you are talking to a decision maker, who has the authority to approve of the purchase?

Your Sales Pitch

Create an informative and persuasive presentation. Take the time needed to craft your sales presentation and practice the delivery. Be prepared to answer the questions of why you should be selected as a consultant, and why retaining you now is in the prospect's best interest. Build your case and identify your strongest points. Point out the return on investment your prospect will receive by retaining you.

Terri Sjodin of SjodinCommuncations.com presented a workshop that I attended in which she identified the 9 biggest sales presentation mistakes:

1. Don't wing it. You must be prepared.
2. Don't be too informative versus persuasive. Your job is to sell.
3. Don't misuse the allotted time. Divide the key points of your talk into the amount of time you have to deliver your message.
4. Don't provide inadequate support for why the client should choose you.
5. Don't be boring. Your presentation should be worth listening to. Be brief, clear, and concise.
6. Don't rely too much on visual aids. If you use PowerPoint, it should be a visual aid and not the center of attention.
7. Don't use distracting gestures and body language such as chewing gum, twirling your hair, or clicking a pen. Keep the focus on your message, not on your gestures.
8. Don't wear inappropriate dress. Wear your best clothes for a sales presentation.
9. Don't fail to close the sale. Ask for the business.

Consider combining mailings with in person meetings. Follow up an in person meeting with a thank you card. You might create a card with the picture of the

person on the front of the card. For example, if you had lunch with the person, you may ask the waitperson to take a picture of you two sitting at the booth at the restaurant. You could send a card afterwards with that picture on the front and a little voice bubble that might have something that is humorous or thought provoking.

These cards are kept and remembered. People don't tend to throw away pictures. So they're going to keep that, which means that you are going to have top of mind influence on them because they're seeing your card all the time.

Sometimes pictures are not appropriate or you don't have pictures that are appropriate to use. The inside of the card could contain a heartfelt message. A society that is very connected electronically may appreciate the personal touch.

Closing the Sale

You've located your prospect, communicated your competitive advantage, and presented your expertise. You have determined that you have the expertise to assist the prospect. Now it is time to close the sale. Here are some sample questions:

- Does what I have explained sound like something your law firm would need?
- Does this sound like something you would want?
- What would it take to move this proposal from a nice to have to a must have?
- What would it take to put this in your language so you would understand what I am trying to offer here?
- How do I make my services more appealing or relevant?
- When might you want me to start? This is called an assumptive close. You can also gain additional information into the prospect's thoughts based on what he does with his eyes once this question is posed. If he looks up and to the left, he may be recalling what might prevent the consultant from starting. If he looks up and to the right, he's more than likely contemplating when the consultant could start, or assessing what might occur in the near future that would prevent such action. The prospect's eye movement would have to be confirmed (meaning how he displays such gestures) prior to posing the question.

Contracts

You have followed up to get a decision on using your services. You learn that the prospect wants to close the sale and asks you for a contract. You will need a contract

that defines the services you offer. Contracts should identify services that you provide and make the client aware of additional services that you offer.

There are various ways of calculating fees. All include a provision to cover out of pocket expenses. Look for examples of contracts by doing an Internet search using the term “consultingcontracts.pdf.” You’ll find samples that will give you some ideas.

Consider your overhead and all of the expenses associated with running a business. Do not join the race to the bottom of the hourly fee scale. Know the typical fees charged by the people in your area. If you are aiming for a lower quality or a lower-priced service, that's one level of clients that you're going to attract. If you're focusing on boutique firms, or being at the top of your fee range, then that will dictate another type of pricing.

Your contract should specify the payment terms. Include in your contract any requirements for interest that will be charged for late payment and requirements for retainers. Provide a contract that covers what you discussed with the prospect, but also offer a few additional options that add to the value and the cost of the project. Your prospective client may not have thought of those additional services and could decide to upgrade the project.

Carefully proofread your contract. Make absolutely sure you are sending the final agreement, and not a draft.

Modify your contract based on your experiences. At Med League, we have a consulting agreement that is three pages. Every paragraph came from either someone else’s contract or is based on an unpleasant incident we had with a client. Every time we have a problem with an attorney who doesn’t understand some aspect of working with us, we try to plug that hole in our agreement so that we can avoid problems by being very explicit. Those clauses are all from the school of hard knocks.

After your prospect signs the contract, do something special to enhance the relationship. Be aware that buyer’s remorse may set in. Your goal is to have the prospect feel good about the interaction and be eager to start working with you.

Know, Like, Trust, and Remember

People say that they do business with people they know, like, trust and remember. But if somebody knows, likes and trusts you but she doesn’t remember you when she’s ready to hire you, then it doesn’t really matter how much she knows, likes and trusts you. Building that relationship and staying in touch is very important for

being hired. One of the keys is to establish yourself as a credible consultant and then keep your name in front of those individuals, all those prospective people that you want to work with, to continually be remembered. If you contact them today, they may not have a need for your services. A month from now maybe they will and if they've forgotten who you are, if you haven't left an impression and then stayed in touch, that makes a difference. The next chapter will give you more ideas about how to do that.

Resources

Jeffrey Fox, *How to Become a Rainmaker*, Hyperion

Joe Girard, *How to Sell Yourself*, Warner Books

CJ Hayden, *Get Clients Now*, AMA COM

Tom Hopkins, *How to Master the Art of Selling*, Warner Books

Caryn Kopp, *The Path to the Cash: The Words You Need to Bypass Those Darned Prospect Objections*, www.kopp consultingusa.com

This information comes from Pat Iyer's book, *Building Blocks for a Successful LNC Practice*. Get it at this link. <http://patiyer.com/products/building-blocks-for-a-successful-legal-nurse-consulting-practice/>