



# 2017 STRATEGIC PLANNING, SALES AND TURNING PAST CLIENTS INTO FUTURE REFERRAL SOURCES

## STRATEGIC PLANNING – A LIFE OR DEATH EXAMPLE

### 1. Your 20 Mile March

- a. A Race to the South Pole
  - i. The Amundsen and Scott Expeditions (include summary and photos)
- b. What's Your 20 Mile March?
  - i. must be specific, repeatable, attainable (stretch goal) and uniquely yours (cannot be a copy)

### 2. Start with your “WHY”

- a. Three Key Questions:
  - i. Why do you do what you do?
    1. What's the reason for getting out of bed in the morning and why should anyone care?
  - ii. How do you do what you do?
    1. What makes your brand or process unique enough for someone to identify with you and remember who you are?
  - iii. What do you do?
    1. What do you deliver to your clients? be specific
- b. Pursue Purpose, Not Profits
  - i. People don't buy what you do; they buy why you do it.
- c. The “WHY” Workshop
  - i. Why: I make goals and dreams come true.
  - ii. How: By getting to know my clients at a personal level, I am able to discern their true needs and deliver on them.
  - iii. What: I aggressively market and find property that meets the needs of my clients.
- d. Audience participation – what is your “WHY”

## **SALES – HOW DO WE GET THEM?**

- a. How will they discover you?
- b. What Drives behavior?
- c. How to convert a lead into a client?
- d. The “No Close, Close”

## **SALES – HOW DO WE SERVICE THEM?**

- a. Create an emotional experience (The “Experience Economy”)
  - i. The creation of moments that are so memorable that the experience becomes the product
  - ii. “Work is Theatre and Every Business a Stage”
  - iii. Evolution of economies
    1. Agrarian
    2. Industrial
    3. Service
    4. Experience
  - iv. Evolution of a products
    1. A commodity business charges for undifferentiated products.
    2. A goods business charges for distinctive, tangible things.
    3. A service business charges for the activities you perform.
    4. An experience business charges for the feeling customers get by engaging it.
    5. A transformation business charges for the benefit customers (or "guests") receive by spending time there.
  - v. Experience Workshop
    1. attributes of a memorable experience (good or bad)
    2. Wants v. needs of a client
    3. What does your “Script” include?
- b. Deliver. Every time!

## **SALES – HOW DO WE KEEP THEM?**

- a. Continually Invest in the Relationship
- b. Acknowledge, Align, Assure, Apologize and Ask
- c. Own and Quickly Overcorrect
- d. Observe Patterns
- e. Stay Connected
- f. Sphere of Influence

## **TURING PAST CLIENTS INTO FUTURE REFERRAL SOURCES**

- a. Be humble
- b. Be charitable
- c. Show genuine appreciation
- d. Deliver “I can’t believe that just happened” service

- e. Add continual value
- f. Make personal contacts
- g. Celebrate life moments
- h. Stay connected
- i. Connect clients with other partners that will add value
- j. Ask for and celebrate referrals
- k. Be THE expert