

**PREVIEW COPY**

# The Marketing Machine<sup>®</sup>

for

*Professional  
Services*

Endless quality referrals for lawyers,  
accountants, consultants, and more

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## *PREFACE*

Why another book on sales and marketing? Hasn't everything that can be said about advertising, marketing and sales already been said, re-said, regurgitated and published in virtually every form possible?

Whether the answer is "yes" or "no," some people still haven't gotten the message. Why not?

That's not an easy question to answer but a little history will give you an idea of why we are addressing it here.

I'll keep this short and then give you a three point answer.

OUR HISTORY MADE IT POSSIBLE.

I (Joe) got into the marketing world pretty much by accident. Having started off my professional life as an electronics engineer-turned counterspy and industrial security executive, I came into the field with an odd set of expectations. Virginia, trained as an educator-turned-Financial- Planner, was a marketer by default, being responsible for building the client base for her firm.

We began specializing in lead generation programs for major corporations, including financial giants like American Express, Charles Schwab, Bank One, Wells Fargo and scores of others. What we learned about the business of generating inquiries for products and services would set new standards for the creation and strategic use of direct mail by corporate America.

Three decades later, happily laden with accolades, awards and a history of nearly \$5 Billion in sales for national and international clients, Virginia and I decided to change focus. For the past few years we have been working with professional services providers, smaller, socially responsible businesses and environmentally friendly organizations that couldn't afford major marketing agencies.

We expect this book to be criticized for lumping all professional services together and we accept the criticism. But we're starting this way because we've discovered some consistent themes that seem to apply in all these businesses.

Maybe that's because professionals are, by definition, a breed apart!

In any case, our plan is to hit the press with the rest of the series: The Marketing Machine® for Accountants, the Marketing Machine® for Attorneys and The

Marketing Machine ® for Financial Advisors, etc. Each will address specific ways these professionals can aggressively promote their services, but always with dignity and respect for their prospects and their competitors.

THESE PROBLEMS MAKE IT NECESSARY.

Our objective in writing this book is to address the three most important points in the professional's marketing activities that are all too often neglected in whole or in part:

- First - Most marketing books directed to professional services offer a single recommended solution to their lead generation needs. The recommendation is usually more about the author's experience and biases than about the reader's personal needs and actual capabilities.

We recommend that a system of business development be built around the particular skills of the principals, the characteristics of their marketplace and their positioning vis-à-vis the competition. Even though it's a "system," every system will be different.

- Second - While no one denies the importance of referrals to a professional service, most fail to address the need for controls on the nature, quantity and quality of referrals. The truth is that unsolicited referrals can be inappropriate for the firm's skillset, its size or current needs. Without the controls of disciplined management they can be disruptive to the firm and ultimately be proven unprofitable and even disastrous.
- Third - Perhaps the single most important message we have for members of the professional services – and in particular the small office "solopreneurs" – is to avoid the tendency toward "roller coaster marketing." We all love the work we do for clients. We want to give our all on their behalf. In so doing, though, when we're flush with business we sell ourselves short! We neglect marketing for our most important long-term client . . . ourselves.

We hope you will find our challenges to these three points worthy of your purchase and that you'll look forward to our future works, particularly when we focus directly on your specialty.

***Joseph Krueger & Virginia Nicols***



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## About the **Business Marketing Series**

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When we sat down to write *The Marketing Machine® for Professional Services* we envisioned it as a general guide to businesses serving the Small-to-Medium-sized Business (SMB) community. The book features advertising, marketing and sales strategies and techniques that we have employed over the years with considerable success – and ROI --for major as well as boutique organizations.

In large part, those successes, and the examples in the book, come from the world of Direct Marketing.

As we were writing, it became clear that we had more information and examples to share that **applied to specific professions or industries**. We were frustrated that we couldn't include them all!

Thus the first book became the impetus for an entire series. As of this 2019 update, we now have three basic volumes, accompanied in each case with a workbook. (Reading is one way to learn. Writing adds a whole other perspective!)

The  
**Business Marketing  
Series**  
from  
**The Marketing  
Machine®**

Each book in the series is written for the small business professional. The companion workbook follows the same flow, breaking it up into questions so that you can easily customize the content for your own business.

We've created **specific books and workbooks for Accountants and Attorneys** who work with small business clients.



While each book focuses on a specific profession or industry, there are many similarities between basic concepts and recommendations. As a result, you may see some selective and purposeful duplication of material from one book to another. After all, marketing and sales basics are precisely that – basics that apply across the board.

But in each volume, **many of our personal comments, our cautions and even whole discussions of “marketing psychology” come from experience** we’ve had with your specific profession.

We trust you will recognize those specifics. And we hope you’ll be able to turn them to personal advantage as you build your own successful business.

## *INTRODUCTION*

This is a book about marketing your professional practice. What can you expect from it?

First, be warned that it is not an all-encompassing book on marketing and selling. We struggled with the temptation to create a more thorough work, but came to the conclusion that too much detail for too wide an audience would run the risk of misleading some readers.

Besides, the reality today is that thick volumes simply don’t get read by busy people. And our target audience is mostly working professionals who can benefit by narrowing their marketing efforts to fit their skillset.

I trust you fit that definition!

**First, we will explore a number of media** that can play a role in promoting your firm and your services. This overview will make you feel a lot more comfortable about marketing options in general. You will notice that we do not dwell on social media, and that’s on purpose. We find that the popularity of various social media fluctuates and how to use the different platforms changes regularly. Our goal is to create a **systematic** marketing program, so we tend to focus on media that can be controlled.

Second, as you learn more about each of the options, you’ll find it easier to **pick just the ones that make sense for you**. We’ll simplify things even more by steering you **away** from some of them!

Third, by the time you’re through, you’ll have a good idea of how to **get started on your customized plan**.

Your plan has to be customized, because marketing a professional practice just isn’t the same as marketing a company that sells a product or, for that matter, a service.

And YOUR practice is a reflection of you as well as of your specialty, which makes it even more distinctive.

Let's look into that a bit more deeply.

#### WHAT SETS THE PROFESSIONAL PRACTICE APART?

Your professional practice is different from a company that sells a product. Three things that make it different:

You're selling your talents, knowledge and experience as the solution to a problem, very often **a unique problem**. (Certainly, clients believe their problems are unique!) A one-size-fits-all solution (product) won't do, and can't effectively be advertised.

Because of the **personal nature of the relationship**, the practice takes on a big risk -- coming up with a customized solution that fits the client perfectly. And to lessen the risk, you need clients who fit your skills.

The **value of the solution** often needs to be defined – and it's best when you help a client define it up front. This allows you to charge what you need to charge!

All this “uniqueness” sounds pretty hard to make a plan around, I know. But there is a common thread that runs through all marketing for professional services, and that's what this book is all about.

All businesses benefit from referrals. Professionals can't survive without them. Moreover,

NO PROFESSIONAL PRACTICE CAN PROSPER WITHOUT A CONTINUOUS FLOW OF LEGITIMATE REFERRALS.

Why is it so hard to get that flow going? Here are a couple of thoughts about that, based on many years' experience.

The common wisdom is that referrals are free.

Nothing could be further from the truth!

Certainly, the person making a legitimate referral does not normally anticipate payment. On the other hand, if you expect friends, associates and clients to offer legitimate referrals then you have to educate them!

More than that, you have to educate each referral source – friend, associate or client – differently. All that educating certainly isn't free.

Another common assumption is that if people know you well, they are in a position to give you great referrals.

And again, this “wisdom” is flawed. Genuine respect or enthusiasm for you as a person helps, but if your referral sources don't understand what it is you really do, generally how much you charge and which of their friends or associates is likely to be the “right fit” for your services, they are likely to send you absolutely the WRONG referrals!

Remember the comment above about our “steering you away from some marketing methods?” Well, here's a piece of advice to start with:

**THE WRONG REFERRALS COST YOU MORE THAN MONEY.**

Referrals to the wrong people put you in a difficult, even embarrassing position. They waste your time. They tie up your emotions. They cost you money.

And because you can't serve them well, they can poison the well for future business.

Our goal with this book is to help you build a healthy referral “system” based on a solid understanding of your own strengths, the kinds of problems you solve and the kinds of clients you welcome.

A couple of afterthoughts . . .

I know of no other business category where “chemistry” is more important than for professionals. Clients are buying you perhaps even more than what you're selling. Getting to know, like and trust you is key to that chemistry you want to be present as you embark on this new relationship.

Building a business so dependent on people and knowledge is a balancing act. If you wake up one morning and find 70% of your base revenues coming from one client, your alarm bells should be going off along with the alarm clock.

Unbalanced growth can strain your finances as well as your staffing . . . and your reputation. Some choices are likely on your horizon!



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You've reached the end of this preview. These introductory pages should give you a good understanding of what drives our approach to marketing for professionals – a no-nonsense, disciplined focus on *what will work for your practice*, given your personal strengths and ambitions.

[Click here](#) to get your copy of the book from Amazon. (Check out the companion Workbook, too.)