


Getting Your First Five Clients



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I publish Bates InfoTips, a free monthly e-newsletter with tips, tricks and techniques for getting more out of your Web research. You can see back issues, and subscribe, at BatesInfo.com/tips I also publish the Info-Entrepreneur Tip of the Month (BatesInfo.com/ie-tips), specifically for people who run their own information business.

The part of my business that I enjoy most is offering customized business coaching services to new and long-time info-entrepreneurs. You can see more info on this at BatesInfo.com/coaching.

I've also written a whole book about the info-entrepreneur profession — [*Building and Running a Successful Research Business: a guide for the independent information professional*](#). The second edition, published in 2010, is available through my [Bates InfoStore](#). I include half an hour of my business coaching services when you purchase the book directly from me.

I welcome any comments or questions you have regarding the material in this eTool.

Mary Ellen



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Getting Your First Five Clients

You may be just considering starting an information business, or you have just started your business but do not yet have customers beating a path to your door. How do you find clients? Should you start making sales calls? Knocking on doors? Should you send out a mass mailing of your brochure? Email your whole contact list with a link to your web site? Even if you *do* have a better mousetrap, how do you get people to beat a path to your door?

Most successful info-entrepreneurs find that virtually all their business comes from word of mouth:

- a subscriber to your email newsletter forwards the latest issue to her work group with a note recommending you
- a client changes jobs and passes your name along to his new colleagues
- a colleague has worked with you on a volunteer project and refers people to you for your specialized services
- your blog is linked-to from other thought leaders' blogs – an implicit endorsement of your expertise
- attendees at your presentation take valuable handouts back to the office and distribute them to others

The challenge for anyone just starting out is, of course, how to get that word of mouth starting. This eTool provides tips, tools and strategies to build your network and start getting clients.

“So, What Do You Do?”

When you launch your business, your first challenge may be describing yourself in a way that is memorable, clear and concise. It is tempting to say, “I utilize online databanks, document delivery companies, and manual research in order to satisfy the informational requirements of clients.” What you want is something short and pithy,

that emphasizes the *value* to the client, not the specific features of your business. For example, you might say, “I help advertising agencies develop better marketing strategies” or “I bring you insights from the external world so you can make more strategic decisions.” Your goal is to help your prospective clients you, and people remember value – that is, what’s in it for them – not your background.

Paul and Sarah Edwards, best-selling writers and speakers in the working-from-home arena, suggest you describe yourself by demonstrating how you solve a problem. For

Focus on what your clients value, not what you do.

example, “You know how frustrating it is when you get blind-sided by a new product rolled out by your competitor? Well, I provide business intelligence on your competitors and prospective clients to help you stay ahead of the

competition.” Again, the focus is on how my services benefit my client, rather than on the specifics of what I do.

Who Are My Clients?

Until you have some clients, it is hard to know who your clients are. One technique is to start by writing short descriptions of client projects that you would like to work on. You don’t need to write about actual client jobs – you can invent the clients, projects and your deliverables. The point is simply to start thinking more creatively about what you can do with your skill sets. Here’s how it works...

Each of these stories, or vignettes, is no more than four sentences and around 100 words. Each one will describe a situation a client is in, what the client got from you at the end, how the client benefited, and how much this project is worth. You don’t discuss how you gathered the information, what sources you used, or even what kind of research you conducted. The truth is that your clients doesn’t care what you do or how you do it. They just care about how you resolve their problems.

Here’s what a client vignette might look like, keeping in mind that you can make up all of these stories.

[Describe your client's situation] My client was considering moving into the organic personal care market.

[Describe what your client gets from you] I provided my client with an overview of the market, with the key issues highlighted and profiles of the key competitors.

[Describe what the client does as a result of your work] My client decided to focus on organic and natural baby care products, realizing that this was the area in which they had a clear advantage.

[How much can I charge for this?] I charged \$5,000 for this project.

Write 10 of these vignettes and then set back and reflect. Which of the vignettes felt most fun? Which ones get you so excited that you want to tell other people? Did you find it hard to set a price on your project? Do you see patterns in the stories — are you drawn to a particular profession or industry, or a particular service?

The virtue of this exercise is that it takes the focus away from what you do, and turns the attention to where it belongs — on what your client values. It also helps you think about adding value to increase the budget.

Another benefit is that you can put these vignettes up on your web site (without the budget figures); they are a far more effective way to highlight your value than just listing your services. Even if you never publish the vignettes, you are more compelling when you are talking with a prospect, because you have examples of why and when a client would call you and you have started thinking about how to make a project more valuable to the client.

See Yourself as a Business

You are selling something intangible — the assurance that you will provide the best information services you can within your client's budget and time constraints. So, how do info-entrepreneurs market themselves and their businesses? No single technique works for everyone; in fact, most info pros take a number of approaches, which work together to bring in clients.

First, demonstrate confidence in yourself and your "product". Exude an air of competence, confidence and enthusiasm. Trite as it sounds, people are attracted to positive, up-beat people. If you are friendly, outgoing, excited about your business and the profession, and interested in other people and their needs, people will feel

good about you and your company. And the reverse holds true as well. If you do not feel confident in your abilities, if you sound desperate for business, if you do not really think your business will be around in six months, this shows too.

Telling a client you will do the first job for free in order to get experience, or that you will charge half your regular rate for the first job, sends the message that you do not value your skills. It is important to establish a bottom line of what your time is worth and to stick to that rate. Providing professional services means that you are focused on quality rather than quantity; it is far easier to land 5 projects at \$5,000 each than

Clients assume you price yourself according to your value.

50 projects at \$500 each. (See my eTool “What’s My Hourly Rate?: How to Set Your Professional Fee to Ensure You Make a Profit” for more on determining your hourly rate.)

Hanging Out With Your Clients

Join professional associations that your clients are likely to belong to and become an active participant. (Don’t know what associations your prospective clients belong to? Conduct informational interviews to learn. See my article on informational interviews at bit.ly/jjkdt7.) Although your clients will not necessarily be in your local area, attend local meeting of associations of your client base. Not only do you give prospects an opportunity to meet you, you have a chance to learn the critical issues of your prospective clients.

Just showing up at meetings your clients are likely to be attending isn’t enough, though. Volunteer to write an article for the group’s newsletter. Volunteer to work on the local programming committee. Bringing your perspective as a new member, help develop an outreach program for other new members. Offer to help with other activities that get you in contact with as many members as possible.

At any professional networking event, arrive early and mingle. Don’t sit down until the last minute. Go up to people and introduce yourself. If this feels difficult, make a commitment to yourself that you can leave as soon as you have talked with ten people. As an introvert myself, I have found a lot of great advice in Debra Fine’s book, *The Fine Art of Small Talk: How To Start a Conversation, Keep It Going, Build Networking Skills and Leave a Positive Impression*.

Speak at professional events, such as a local meeting which your client base is likely to attend. (If you’re not confident of your speaking skills, consider joining Toastmasters.

Some groups are more business-focused than others, so shop around.) Most people responsible for organizing professional meetings are more than happy to be approached with the offer to speak.

No one wants to hear a sales pitch, so be sure that your proposed topic is one that will interest the attendees as well as establish your expertise. For some groups, that might be a thought-provoking talk, looking at how a current trend may affect that group. For other groups, it might be how to use social media to monitor your brand, or how to use LinkedIn for competitive intelligence. The point is to provide value to the group and to establish your position as an expert or thought-leader.

It's All About the Network

Just as we rely on our personal network to get referrals for a good real estate agent, dentist or therapist, so clients ask colleagues for "someone who can help me {fill in the blank}". We need to cultivate our professional network to ensure we are familiar to as many people as possible. We want to make sure that we come to mind when someone is asked "Do you know someone who ...?".

Unless you want to conceal your business (as do some competitive intelligence professionals, for example), you need a professional presence on the web and in LinkedIn (or the primary professional social network for your clients), as well as with a blog or e-newsletter. Make sure that each "presence" links to all the other ones, and keep your profiles updated and fresh. Many people expect to find you in social media;

Think of every professional encounter as a marketing opportunity

you are essentially invisible to them if you aren't in their network.

Think of everyone you know professionally and ask to link with them through professional networking sites. Unless you are contractually prohibited from doing so, contact everyone you know from your last job. Ask them who they know in other companies who might be interested in your services. Marketing to prior employers is often a very fruitful avenue, as they know you and your abilities. Note that this is yet another reason why you should never burn bridges when you leave a job. Negative word of mouth spreads just as fast as positive referrals.

Tell family and neighbors about your services. Ask everyone you talk with whether they know anyone else who you can contact. You would be surprised at how many referrals you can get just by asking. And keep your eyes and ears open for organizations or individuals who could turn into clients. Read the business section of

your local paper and, since you need to think globally, not locally, read the *Wall Street Journal* and several major trade journals in your area of specialization regularly. Make a point of staying up on business and industry topics.

Keep in contact with all your prospective clients and send them material regularly. I have prospects who have subscribed to my newsletter for years without ever turning into clients. And I'm happy to keep them on as subscribers. Why? First, I never know when they may turn from a prospect to a client, or when they change jobs and *now* have the budget to hire me. And second, I often do not know if a prospective client is regularly referring other clients my way. The only names I remove from my email list are those for whom I get bounce e-mail or a request to unsubscribe. I also encourage readers to forward or republish my newsletter, as long as it includes a link to my web site. This multiplies my "voice" tremendously.

First-Year Do's and Don'ts

DO spend money on creating a professional image. Make sure that your letterhead (whether print or electronic), business cards, brochures and other marketing material project the image of an established, successful business. Make sure that your prospects' first impression, whether by telephone, email, Facebook wall, mail or in person, sends the message that you mean business.

DO dress professionally whenever you appear in public. Whether you are giving a talk, attending a trade show or conference, or just going to a local professional meeting, always dress in standard business attire. It is nice to be comfortable, but casual clothes do not send the right message to prospective clients. Remember, you have to look like you are worth what they will be paying you, so put that suit jacket back on.

DO follow up with every lead you get. If this is someone you met at an event, send a hand-written card (yes, hard copy!) saying how much you enjoyed the conversation and following up with an invitation to subscribe to your e-newsletter. If it is a personal referral, mention the name of the person making the recommendation when you contact the prospect.

DO join and participate in the Association of Independent Information Professionals. Nowhere else can you get to know so many experienced, well-known independent information professionals. Its private electronic discussion group, AIIP-L, lets you bounce ideas off hundreds of your peers around the world. Attend the annual AIIP conference, even if you think you cannot afford it. Save frequent flyer miles, or watch for sales on airline tickets. Share a conference hotel room with a colleague to cut hotel costs in half. Whatever it takes, consider this one of your most important professional conferences of the year; the contacts you make here will serve you well for years to come. And volunteer to serve on an AIIP committee. It is a great way to get to know other AIIP members and, just as importantly, for them to get to know you. Referrals among AIIP members are common, but you have to be known to be referred.

You have to be known to be referred

DON'T lower your billing rate in an effort to get new business. If a prospective client objects to the cost of your proposal, do not offer to discount your rate for the first job. All that does is tell the prospect that you do not value your own services very highly. Instead, offer to do only a portion of the project for a lower over-all cost; when you complete that part of the project, outline what else you could do for an additional fee.

DO listen to your clients and prospects. A casual suggestion may point the way to setting yourself apart from the competition. If a prospect mentions that she has never been able to keep up on new trends in polypropylene widgets, or that she is frustrated when she tries to find information on a competitor, you have your opportunity.

DON'T ever, ever take on a job you do not think you can do superbly, or that you can subcontract to someone who is an expert. Your client will be able to tell if you take on something beyond your expertise and will not use you again. On the other hand, if you either develop a network of subcontractors to whom you can turn or you refer such projects to other experienced info-entrepreneurs, you maintain the good will of the client and send the message that the work you do will always be of the highest quality.

DO listen to your gut. At some point, you will probably get a call for a job that just sounds wrong. Maybe you feel there is not a solid communication between you and the client, or the client is not able to clearly articulate what she expects, or you just get a feeling that something is not clicking. When that happens, graciously turn down the work or refer the client to a fellow AIIP member. Often, these situations are simply caused by differing communication or personality styles; it does not reflect poorly on you or the prospect.

DON'T get discouraged! Every info-entrepreneur, even those who have been in business for years, have slow periods when the phone never seems to ring and the clients seem to have disappeared. Maybe there is a downturn in your prospective clients' industry; maybe it is the slow time of year for most of your clients. Use that extra time to send out an additional marketing piece, fine-tune and update your web page and social media profiles, and attend more local networking meetings than you have in the past. As long as you keep marketing all the time, the clients will come.

What Doesn't Work?

OK, it's true that each of the following marketing approaches can work and has worked for approximately 1.83% of new info-entrepreneurs. If you believe that you are part of that 1.83%, then I encourage you to try any of the marketing techniques I describe here. If not, consider moving on to more effective strategies.

Direct Marketing

Generally, people will not buy your services based on an unsolicited email or hard-copy brochure, particularly if they do not already recognize your name. Direct mailing must be repeated at least four or five times before it becomes memorable, and "memorable" doesn't necessarily translate into a sale. Cold calling, the other major direct marketing technique, requires a large expenditure of otherwise-billable time, the one thing you have in limited supply. Do you really want to spend four or five hours finding telephone numbers, making cold calls, following up with voice mail, and so on, and only reach a few people? You could have spent that time and saved the expense of the mailing by focusing instead on reaching many more people in a higher-value context.

Direct mail can work if you have a very targeted list, e.g., medical malpractice lawyers, say, or university fundraisers, and if you customize the mailing to that particular group, indicate that you understand their specific concerns, and so on. Even then, expect a response rate of no more than one to three percent. Consider whether this response rate will justify the time and expense involved.

Promotions and Incentives

Info-entrepreneurs who offer discounts on the first job they do for a client (“fifteen percent off if you call now”) often find that this backfires. First, it appeals primarily to the most cost-conscious of your clients, and your goal is to find clients who set a high value on the information services you provide and who are able to engage you in high-value projects. Second, even if you make it very clear to your clients that this is a one-time reduction in your fee, they often expect the discount on subsequent projects and you create ill will when you appear to be raising the price on the next job.

Your goal is to find clients who set a high value on your services.

It is also tempting to offer some kind of reward for clients or prospects who give you referrals. Be very cautious here. You do not want to get caught in the trap of having the referring party expecting a check each time a referral is made. Conversely, many employees are not allowed to accept payments or other compensation for referrals. Instead, offer them profuse thanks and a donation in their honor to a non-controversial charity.

In-person Sales Calls

As a rule, in-person sales calls are not worth the time invested in them. Unless the client is ready to sign a very large contract on the spot, you are better off spending that time preparing for a speaking engagement, developing your web site, sending out a newsletter, or doing something else that reaches more than one person at a time. When you factor in the time it takes to get prepared, drive to the prospective client’s site, meet with the prospect, get back to the office and finally get back to work, you have easily spent half a day on a single prospect. And, of course, when you focus on trying to arrange individual sales calls, you have inevitably limited your sales efforts to your local area, which significantly restricts your opportunities to grow.

Instead, focus on marketing to as large a geographic area as possible. Your marketing efforts are much more fruitful when you are talking to many people at once.



About Mary Ellen Bates

Mary Ellen Bates is the owner of Bates Information Services, providing strategic business research to business professionals, and consulting and training services to the information industry. She is a frequent keynote speaker, and is the author of six books and innumerable articles on the information industry. Her latest book, the second edition of **Building and Running a Successful Research Business**, is available at BatesInfo.com/store.

Mary Ellen offers strategic coaching services to new and long-time information entrepreneurs and other info pros. She offers both a strategic perspective and a practical approach to helping you create a business that you love and that is profitable. See more information about her coaching services at BatesInfo.com/coaching.

Mary Ellen offers two free email monthly newsletters:

“Bates InfoTip” (BatesInfo.com/tips) and

“Info-Entrepreneur Tip of the Month” (BatesInfo.com/ie-tips)

If you would like to subscribe to either, just ask (mbates@BatesInfo.com)

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