

Even the most specialized firms are capable of delivering a range of services that are broader than their declared specialization. It's tempting, therefore, when making a telephone introduction, to pursue all the work that your firm is capable of instead of focusing on the work that it is best at. The mathematics say that if you throw more offerings at a client-to-be, there's a greater chance of finding a matching need. But the math is wrong.

The Armor-Piercing Telephone Introduction

We all know that positioning is an exercise in relativity, yet we sometimes forget the purpose of positioning that this implies: to reduce or eliminate competition.

By aligning the resources of the firm against a narrower area of focus, you build deep expertise in that area and meaningfully reduce the alternatives to hiring your firm. The benefits include a greater ability to control the buying cycle (winning the business without pitching free ideas), a larger price premium and, when employed correctly, a more effective telephone introduction.

Your Wedge of Offerings

As you prepare yourself for your next telephone introduction think of your entire suite of offerings as a wedge, with your deepest expertise placed at the thin edge. As you move back from the thin edge you have your less specialized offerings, with your most commoditized offerings – the things that you do but everyone else does too, at the rear-most, broadest end of the wedge. For even specialist firms these broader offerings can account for a large percentage of the firm's income.

The specialist, front edge of your wedge is relevant to the fewest clients-to-be. At the very back are those generalist services that almost everyone needs. Now let's do the math on the most efficient way to present your wedge of offerings to your clients-to-be.

The Math of Telephone Introductions

The natural inclination when calling into a client-to-be is to present as much of the wedge to him as possible. By throwing it at him sideways you are able to showcase the breadth of your offerings to him, hoping that he has a need for at least one of your services. Mathematically, you should stand a better chance of matching need to service by presenting this side edge of the wedge first.

Your next best option is to present the back end of the wedge, where you would be leading with just one offering but it would be one for which many companies have a need.

Tip of the Spear

We all know what a spear looks like and how it works. And that's exactly how you should think of your wedge of offerings. When done properly, it is the tip of the spear that pierces the client-to-be's resistance and leads to a meaningful conversation, which in turn leads to an open assessment of whether or not there is a fit. This is all you really want from your telephone introduction: introduce your firm to a targeted client-to-be and have a meaningful exploration of whether one party has the expertise to help with the others' needs.

Two Approaches to the Introduction

Let's say that your firm has deep expertise in the area of customer loyalty programs. Behind that spear tip you probably possess broader one-to-one marketing and even broader advertising and design capabilities.

Now let's dial up a client-to-be and look at two different ways you might wedge your offerings into a client-to-be via a telephone introduction.

Broad End First

"Richard Client, here"

"Hello Richard. My name is John Doe. I'm calling from Acme Creative. We're a strategic marketing firm that does branding and web design. Do you have a couple of minutes to talk to me about your marketing needs?"

The client responds.

"John, we work with a large branding firm, a large advertising agency, an interactive firm, a social media advisor and probably a couple of other firms that do what you do. Thanks, but we're well taken care of."

You try some more.

"We also do one-to-one marketing and customer loyalty programs. Do you have any needs in those areas?"

The busy client-to-be raises his shield even further to protect himself. He doesn't have time to indulge you in your fishing expedition.

Tip First

Now let's try leading with the tip of the spear.

"Hello Richard. My name is John Doe. I'm calling from Acme Creative. We're a customer loyalty marketing firm. We work with the consumer-facing Fortune 500 companies to help them develop innovative new ways of improving customer loyalty."

"I'm calling because we work with a small number of new clients every year and I'm in charge of finding the right fit. Our services aren't for everyone so I won't be offended if you don't see a fit here, but we do have a lot of experience building innovative programs for companies like yours, including at least one of your competitors, so I wanted to make the introduction and see if this is an area you're interested in exploring for a couple of minutes. Are you?"

With this introduction you might hear the same “Thanks, but we’re taken care of” response, but listen to how it differs.

“Well, I’m working with a few different firms right now, some of which do some customer loyalty work.”

You reply.

“I understand. Lots of ad agencies dabble in this, just like we offer advertising and branding to some of our clients who want it, but that’s never why we’re hired. We’re hired because we do innovative loyalty programs better than anyone else. Is improving customer loyalty a priority for you right now?”

In the first example the client hears you casting a wide net hoping to catch something - anything. He responds by saying that he’s already working with firms with deeper expertise. In the second more focused example the client-to-be responds that he’s already taken care of on this specific issue, but by firms with *less* expertise. This allows you an opening, so long as you continue in a manner that remains both targeted and selective. You might be capable of meeting many of his needs, but you limit your enquiry to the one area where you feel you can help best. In this way you endeavor to pierce the armor of the incumbent agencies by offering a deeper expertise within a narrower focus area.

Deconstructing the Spear-Tip Intro

You’ll notice that contrary to the blunt-end approach, leading with the tip feels a lot more selective. You project the air of a specialist who is carefully identifying the best people to call, rather than someone smiling and dialing from a long list.

Further, by being choosy about the fit you invite the client-to-be to say if he sees none. This allows him to relax. If he senses you really are interested in the fit and you’re not about to try to talk him into anything then you’re more likely to have a meaningful conversation. Inviting the client-to-be to say no removes the emotional weight from his decision and allows him to lower his defenses.

Note that the selectivity you demonstrate begins with more narrowly describing not only what you do (build innovative loyalty programs) but also your client base (consumer-facing Fortune 500.) By mentioning that you only work with a few new clients every year you further project selectivity and imply the patience of someone who has no need to talk people into things.

Try It for One Day

You only have to try this spear-tip approach for one day to see that it is more effective than trying to bludgeon your clients to be with your broader offerings. Don’t be mesmerized by the false math. Lead with the tip of the spear, be dismissive of your broader offerings that are shared by numerous other firms, and invite the client-to-be to tell you if he doesn’t see a fit. It’s counter-intuitive to some people (including mathematicians), but it works.

Try it and let me know how you do.