

Webinar Title: Going to Market as a Consultant

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Hosted by the Society of Consulting Psychology (Div. 13)

Div. 13 President Liz Sweigart, PhD: Hey, everybody. It's good to see everyone this afternoon. Hello. Love the turnout, appreciate y'all being here. I am excited for us to get to this conversation with one of my favorite people, Mitch Schuckman, my former partner at PwC, one of the best proposal coaches I've ever had, and just someone whose style in going to market, I have tried to emulate and I appreciate. Mitch is the definition of telling it like it is, but with kindness and a good dose of humility. I'm not going to try to encapsulate Mitch in an intro, I'm going to turn it over to him for that.

Before we dive in, if we have visitors from other divisions, I would love to recognize you, if you would drop your division number and maybe even the name in the chat. Love to welcome our friends from across APA and are just really glad that you are able to join us. Thank you to all who have joined, and we look forward to a great session. With that, I don't want to take any more time away from Mitch, let me turn it over. Mitch, you're on.

Executive Coach Mitchell Schuckman: Thanks, Liz. You're one of my favorite people too. Let me introduce myself and let me turn these slides on. By the way, here's what we're going to do on slides. I've got a couple of slides and then I'm ditching the slides because I feel like a conversation is a lot better than staring at a screen with slides. I've got a lot to have a conversation about, and we'll get into it right away. Just one point of information.

Here's my current plan, I'm totally flexible. I was going to go for the first 30-ish minutes talking about go to market, business development for your own practice, and all of that. Then I was going to save some time for Q&A, and then I was going to save some time for breakouts. Lorenzo has agreed to monitor the chat kind of later in the session because we can go longer on Q&A and less of the breakouts if you want to keep speaking with me, or we can do breakouts and I'll just jump into one of the breakouts. It'll be an informal survey through the chat during the course of the session.

Who's Mitchell Schuckman? Liz mentioned that I am a partner at PwC, but not for more than another eight weeks. I have an interesting mix of experiences. I'm going to share that mix with you because I feel like it makes the conversation today a little bit more relevant. I'm a CPA, I'm an accountant, and I started my career at PwC doing taxes, and I did taxes and only taxes for 25 years.

One of the things I did really well when I did taxes, is I was really good at bringing in new clients. I was really good at that, and because of circumstances and because of my request, I was going through a mid-career crisis, I ended up shifting my focus, and the firm let me, shift from being a tax partner doing client service to leading our proposal team across all of tax. Over the course of my career, I've coached well over 1,000 competitive proposals, but more importantly, helped people learn how to tell their own story in the market and how to understand the client or the potential buyer in what they were thinking and what was driving them.

I've done that for well over a decade. Worked on literally well over 1,000 proposals, coached thousands of people on this, and about five years ago, I kind of realized that while I love coaching proposals, what I love even more is when partners or professionals would call me up after the proposal and say, "Hey, Mitch, you really helped us and would you be willing to coach me one-on-one?"

I ended up going back to school, I got my professional coaching certification from ICF. I'll reach my mandatory retirement date from the firm in just a few short weeks because PwC and all the Big Four partners retire at a specific date. At PwC, it's when you turn 60. I'll reach my mandatory retirement date, June 30th, which is the end of the fiscal year, is my last day, and I'll be launching the Schuckman Group, which is an executive coaching, leadership development, and sales consulting, business development consulting practice. That's where I'm coming from.

My beautiful slides which I'm epically failing at launching. [crosstalk] My beautiful slides talked about a three-dimensional view of how to go to market with your own consulting practice. Honestly, Liz had sent me a lot of your questions, and I think I'm going to cover a lot of them, but like I said, we'll have time for Q&A at the end. I was thinking about all of the people I've coached, especially entrepreneurs, especially people who are starting their own coaching business, this comes up all the time. The three dimensions I came up with is marketing, selling, and what I call everyday selling or everyday positioning yourself. Everyday branding, that's what I called it. Everyday branding.

Those are the three areas that when I speak to people starting their own business and especially people in your field, you guys love what you do, you guys love helping people. If you can just help people without having to sell all of that, it would be so much better, but it's not that easy. It just doesn't work that way, so those are the three areas I'm going to touch on. Marketing, because a lot of us don't like marketing; selling, because a lot of people, their stereotype of a salesperson is someone who's in a car showroom; and everyday branding is really hard because people don't like talking about themselves and work so much. Those are the three broad areas I'm going to cover.

Please make note of your questions, lots of time for questions. Area one, I called it authentic marketing. What do I mean by that? Okay. A lot of you, I'm guessing, see people on LinkedIn and on Instagram and sending out newsletters, and I'm sure there are a lot of you who are like, "That is not me. It's not me. I don't want to be on social media selling my wares. It's unbecoming of a professional," some of us would say.

Couple of things. First of all, here's the way I view marketing for people in our profession. You're kind of marketing to your network through a voice to the world. What do I mean by that? Like I've got a network of people that I know, friends, family, colleagues, former colleagues, Liz, I've got a whole bunch of people in this world who I know, and how do I get them to know that I'm legitimately in business? The way to do that is marketing to the world, but you're really marketing to your network. Because ultimately, most of the work you're going to get, I really believe this is true, is through maybe two degrees of separation from someone you know personally.

This marketing, don't view it as I'm going on Instagram so some random person could look at me versus one million other psychologists and hire me. It's not going to work that way. You're telling your friends and your family and your network that you are legit. That's the way I would view it. Please, if you're going to do it, find your own voice. I'm going to do a quick PR move from my friend Maura Walters who joined the call. Maura, you flashed your screen. There you go. Maura Walters [crosstalk]

Maura Walters: [crosstalk] slides.

Mitchell: I thought you could share your screen, I can't share mine. How's that?

Maura: Oh, okay.

Mitchell: Maura has her own marketing and branding firm, and I found her randomly through my wife who saw her on Facebook and said, "She looks like she's got her act together, call her." I called Maura, and I said, "I'm launching my own business July 1, retiring from my corporate job, I don't want to be one of these people who's sending out pithy little mental wellness things. I don't want to be that person."

She helped me come up with an approach. I said, "Here's what I want to be." Because I have 38 years of experience, because I've worked in professional services, because I've run a business, because I know how to sell, because I've coached a lot of people. I have perspectives and observations. I don't want to preach, I don't want to teach. I want to share observations with the world. That's kind of what Maura helped me do. We did it together on LinkedIn. Maura, you're sharing your screen. Oh, look at you. How'd you do that? That's my slides. Okay. Click down a couple, Maura.

Maura: I'm here for you. Oh yes.

Mitchell: That's pretty impressive. Go down a couple slides. Oh, that's a famous quote. Go back to the famous quote.

Maura: Trying.

Mitchell: That's a famous quote by me. "If you're authentic, you care, and you love what you do—selling takes care of itself." Everyone on this call should feel that. All right. Next slide. That's about me. We can forget that, you already know who I am. These are the three lenses we're covering. Authentic marketing, which we're covering now; client-centered selling, which we're covering next; and everyday branding, which is the third thing I'll cover. Okay. Now you can make the slides disappear.

Maura: Okay.

Mitchell: Maura helped me find my voice. Maura and I spoke about what I just said. If you look at me on LinkedIn or on Instagram under the Schuckman Group, you'll see that what I'm trying to do is share with people my observations of the types of people I want to be coaching when I start my own business. We're going to be soon launching a newsletter. We're going to be soon-- I actually wrote a book which will be published in July when I start my own business.

It's all about letting people know you're out there without being salesy and without being something you are not comfortable being. You don't want a photo of yourself on it, don't put a photo of yourself. I'm a photographer. Every photo on that thing is my photos. It's me. It's all about me. That's the way I'd want you to approach marketing. Two other points and then I'll move on to the next thing. Consistency is better than perfection.

I'd rather you post something online every week once or even once a month. I'd rather you do that than throw something out there randomly from time to time. Consistency helps people know your consistently in business. This is consistently something-- you're consistently out there in the world. That's thing one. One other thing, I really believe in appearing professional. That's why I hired Maura, because she does social media and makes it look professional. I don't. Honestly, none of us want to look like our teenagers or our nieces and nephews who are posting silly things on social media. We don't want to look that way.

To be honest, my feeling is the more professional you put yourself out there as, little things, don't go into ChatGPT and say, "Hey, I want to send out a post about stress in the workplace." It's going to write some random mediocre stuff. Now, you want to use ChatGPT to write up a first draft. You want to give it some commentary that makes it more sound like you by all means.

Whatever you do, read it, make it sound like you, be consistent, and make it look professional. I'm going to pause for a second, take a breath, because that's kind of my tidbits on authentic marketing. There's a lot more we could discuss, but that's okay, we're covering a few things today. We're going to go to Q&A and we can continue the dialogue down the road. Okay?

Number two, second area. I called it client-centric seller. This is really my strike zone because this is where I've spent a good chunk of my career, is selling. Just the point of interest. You guys will love this because of all of your backgrounds. When I decided to go into, be a sales coach instead of a client service tax person, I actually hired a forensic psychologist to coach me on how to be a good coach. One of the things that she spent a year, I spent a year with her every week. We met once a week for a year. She was teaching me profiling. I'm probably like a lot of you, just guessing.

I have a pretty good knack for putting myself in the other person's shoes and understanding where they're at as human beings. She helped me. She said, "Look, I do jury selection and crime scene analysis and crisis management. Understanding the two sides to a situation is critically important." That's one of the things that she kind of helped refine my skills at. Anyway, why am I telling you this? Because selling is all about that. Selling is-- What we all tend to do is we all tend to feel like we have to certify ourselves, we have to talk about our skills, we have to talk about our qualifications. Selling is all about the other person. I assume you guys kind of know that.

I don't view selling as selling. I view selling as having a conversation. Once you're out there in the market, and once you start hearing from people, what I love to do is sell to the client's needs. If you're selling to a CEO, and the person reaches out to you and says, "I want a coach," or any kind of counseling, or the person says to you,

"I'm having a crisis in my job," or "I'm starting up my business, and I'm concerned about it," ask them questions about them. The more you know about them, the more you can send your proposal directly to what they need.

Same with the corporate buyer. There are corporate buyers looking to buy your services for a group of executives, for example, or a team that needs-- the individuals need coaching or the team needs coaching. Find out as much as you can about the issues. "Tell me what's going on. Tell me how it's affecting the business. Tell me how it's affecting you." Why am I asking you this? Because I want to send you a proposal that exactly meets your needs, that demonstrates the value to you and to your organization. Sure, during the conversation you're going to have to mention you're qualified.

You're going to have to mention that you have other clients, you have this many years of experience, or you're starting your own business after doing this for so many years, of course, but that's not what's going to sell. What's going to sell is explaining to the buyer exactly how you're going to make them successful. That's the huge differentiator. That's how you're going to seal the deal. After you speak to the person and you need to send them a proposal, make sure-- the proposal does not need to be long. It shouldn't say all about me or why me. It should be short, it should look very professional; again, Maura helps me with mine; but very professional.

It really should start with, "These are the issues I understand you're faced with. This is how I can help you experience value." I feel like-- That's my comment on proposals. The other thing I'm going to touch on, but just touch on, because everyone struggles with this, is pricing. I'm just going to make a few comments on pricing that I think will be helpful, because I think this is something people struggle with all the time. This is my point of view, just one person's point of view.

Oh, I have to come back on one other thing, but let me cover pricing first. A, know your walkaway number. Literally know the number that you will be happy not having the client. Don't even think about what I think I want or what I think I deserve. It's what is the number that if I get it at this price, I don't want it. Once you know that number, that's your floor. That means \$1 above that you'll be happy. Maybe not ultimate happy, but you'll be happy because you're getting something that you would be willing to work for. That's your floor.

Then, this is what I like to do. I like to think about what do I think the buyer has the stomach to pay? What do I think they have the stomach to pay? If it's above my floor, I've got room to discuss. If it's below my floor, it's not going to be a client. What never really enters my mind is what do I wish I would get? Because that's not actually relevant if you think about the parameters I just mentioned. What I wish I get is something I daydream about when I'm walking my dogs. What the client is willing to stomach paying is my best guess at my starting point, as long as it's above my floor.

That's usually the number I go with. I can have different fees for different people. For example, Liz mentioned I'm retiring from PwC. You can imagine there are a lot of PwC partners who are calling me. There are a lot of people who are not partner, who wish they would be partner one day who are calling me. There are also people in the chairman's--, the leadership team who are calling me.

Guess what? They're all getting different fees. I don't care. I don't care if they talk to each other. I think they're at different levels. I think they have different issues. I think they have different challenges. I think they're tapping into different areas of expertise for me. If I come up with that number, and they say, "Gee, it's too high," or "I was thinking about something less," as long as that something less is higher than my floor, that's the number we'll go with. I don't think pricing has to be uber stressful if you approach it that way. That's not like a book. That's just me. That's the way I do it.

One other thing I want to mention, and then I'm going to move on to everyday branding, and that is this. There is a famous stat. I know it's true because I found it on the internet. It's got to be true. It says, 80% of sales take between 5 and 12 touchpoints. 5 and 12. 2% of sales happen on the first try. That's usually probably someone who knows you, calling you in a crisis, saying, "I need your help now. Can we start now?" 2% of the time. Now, here's the key stat. I think it's like 45% of people give up after the first or second try. In my opinion, when you're selling, you've done your marketing, now you've got an RFP or someone has reached out to you and you're selling, now you're selling.

That first conversation is not to seal the deal. That first conversation is to get as many points of information as you can so you can have between 5 and 12 touchpoints and seal the deal. Now, a touchpoint could be conversation number one, followed by a follow-up lovely email, reiterating what you heard and how you can help them. It could be followed after that by a proposal. It could be followed after that by an article you saw that is relevant to the person and made you think of them and hope they're okay and wondering if they've made a decision on the help you need.

The next one could be another piece of thought leadership. The next one could be, "Are you ready to have a follow-up conversation?" That could take weeks, but if you throw enough irons in the fire by doing marketing, letting everyone know you're out there, starting to field phone calls, and starting to have these conversations, you will start having a pipeline of clients. That's the way I do it. That's the way I've seen successful people in small businesses do it. Have a lot of irons in the fire. You're marketing in an authentic way that you're comfortable with. You're selling through conversations about the potential client and you're off and running. Area number three. I'm on time. I'm doing good.

Liz: You are, but I'm going to jump in really fast and mess you up because there's two things you taught me, [crosstalk] what you just went through, two things you taught me that I want to highlight. Absolutely on the touchpoints. You turned me into a little puppy on a pork chop. It's just bite, bite, bite, bite, bite. It didn't have to be big. That's the piece that you got across to me that I struggled with, because I felt that every touchpoint had to be this big grand show, and it didn't. It just had to be something little. It was even better if it had nothing to do with the work.

To your point about the first meeting, gathering every single piece of information you can, this was one of the pursuits we had here in Houston. I found out that our economic buyer just loved her dogs. Her dogs were everything. We even got into a conversation about the kibble she feeds her dogs. I saw an alert on Google about how this kibble manufacturer had a recall. There's a link to that.

Meanwhile, other people are looking at me like, "You did what?" I was like, "This is the most important thing in her life, are her dogs." The next thing I know, she's messaging me more things about her dogs. Mitch, you were the one who said to me, "Liz, when she asked you for your dog walker, that's how you knew you'd won the work, because if she trusts you to advise her on a dog walker, she's definitely going to let you do her taxes."

It's the little things, and they don't have to be big. The more you can show you actually care as a person, that was one of the things you really hammered home for all of us and was one of the hardest things because we're used to showing up and showing off our expertise, not showing up and showing off our humanity. I'm speaking as tax people here, but I think it's universal.

Then the other one was you taught me about the blood pressure factor. When you're doing your pricing, if you're working with somebody who's going to stress you out, you're not just calculating the amount of time that you're spending serving them, you're adding an extra hour that it will take your blood pressure to return to normal after you interact with them. Your point to me was, if you are only pricing for the mental energy to serve the client in the moment, you're taking time away from your ability to serve other clients. In fact, if it takes you an hour to get your head back in the game, you actually are only earning half your rate,-

Mitchell: Yes.

Liz: -so you need to consider client service holistically. It's not just the time that you're spending on whatever the piece of work is, but it's how long it takes your blood pressure to return to normal so you can get back to your life. If that's taking time from your kids, triple it.

Mitchell: Yes, I was just going to say-- I'm going to say it cleanly, but there's the fee that the client can stomach, and then there's the jerk premium that you charge. If you're like, "I--" Well, actually, the way it is, is your floor goes up. In my example, the floor goes up if you have to deal with a jerk, or even if you suspect you might be dealing with one. Thank you, Liz. I'm glad that you remembered some of the things that we worked on together.

Listen, I'm not actually suggesting that you all need to become personal friends with every potential client. The point about that Liz made that we can all follow is this. Showing someone you care about them is selling. Selling isn't selling, especially in our lines of work. Selling is making people feel seen and heard, whether it's through their dogs or whether it's "I was thinking about you. How are you doing?" How many people do that when they're selling work? They don't. How many people see an article or a piece of thought leadership or a LinkedIn post that reminded you of someone and you flip it to them, say, "Thinking of you. Hope we get to work together one day." This is the differentiator.

Let me move on from selling just in the interest of time. There's one other piece, the third dimension of the three dimensions, which I call everyday branding. This is when you're selling all the time. It never stops, not when you're an entrepreneur, it never stops. What do I mean by that? I mean when people say, "How are you doing?" Say,

"I'm doing great. I started my own coaching business, my own consulting practice. I'm really energized by that."

Now, you guys have a huge advantage. I think I do too, because you guys are psychologists. You guys are helping people. Everyone needs help. Even if they're not out in the market for consulting or for your services, every person is a human being, so every person is going to be a little interested in how you're doing. "Oh, you're out there helping people? How's it going?"

Then here's the trick. Now, I'm well aware of confidentiality. I'm well aware that you're not going to talk about a particular client or a particular patient's facts and circumstances, but have some stories ready to roll. When someone says, "How is business doing?" Or "How are you doing?" You say, "My business is really keeping me energized. Can I tell you a quick story about how I helped someone last week?" Change all the facts, all the names. Mark Twain once said, "Never let facts stand in the way of a good story." Come up with a good, relevant story and tell your story. Tell your story, because what are you doing? You're actually marketing, and selling, and credentializing yourself to someone who's going to say, "I've got a friend who can use you." That's the way it works. Marketing is marketing. Selling is selling. Being yourself is being yourself. Don't be scared to talk about the cool things you're doing to help clients. By the way, just remember, when you're talking to people, it's got to be casual and conversational.

Like you're having coffee with a friend at a coffee shop. Just talk to them real, and tell them what's going on. You're helping people. They're going to be interested, and they're all going to know someone who's got a client, or who needs help and could be a client. That's 33 minutes in. I've covered everything at a high level. We're going to take questions. I'm going to say this for the record right now, any questions that you have for me that you want to email me, I will answer within a week. mitchell@theshuckmangroup.com. We'll post that in a minute.

Actually, why don't you post it, Maura? Can you post it? I didn't even rehearse this, Maura. See, it's always good to have someone on your team. There it was. Oh, you lost it. You had it, and you lost it. See, you can click on that.

Liz: I got it.

Mitchell: You get my business card. By the way, you know that I didn't come up with this. You click on this, you get your business card. You click on this, you can follow me on Instagram. You can check out my name and follow me on LinkedIn. You'll get a lot of good ideas on how to position yourselves, but if you send me an email at my business card on the side of the screen, I'll answer your question within the week. Okay? You can take it down again. Any questions? Oh, by the way, the other thing is if you-- we're going to go for about 10-ish minutes before we go to breakouts.

If you guys would rather stay in Q&A, just ping Lorenzo in the chat, and he'll just tell me we're pivoting to more questions. Either way is totally fine with me. Any questions? I'm not looking at the chat. I can't do two things at once. I'll leave that to you. I'll leave that to someone, you have to speak up.

Liz: Mitch, I'll jump in while folks are thinking. Something that has come up frequently has to do with RFPs. When you're starting out, how do you get on? Is there a master list somewhere you need to go sign up for? How do you start generating inbound opportunities through RFPs, finding out about them, and finding out about them also before it's not too late? What's your thinking there?

Mitchell: I'll tell you what I think. I think you're kind of screwed, and I'll tell you why. I was just talking to someone who did the executive coaching training. She's a PCC with ICF as well, and she got on some RFP list. I think once you're on an RFP list, the great news is you get to respond to a lot of RFPs. The bad news is it's almost impossible to differentiate yourself, almost impossible. In fact, unless you get some inside scoop about what's really, really impacting the client, then it's going to be a price play, a price and quals play, and they're just going to look at your qualifications, look at your price, and make a decision.

Sure, if you had Mitchell Schuckman on your team, maybe with Maura's help, we can come up with a really cool-looking proposal that really focuses on storytelling, and gets the client to stop for a minute and think, "Oh, this is different," but that's super hard. You're relying on a piece of paper or a document to tell the difference. I think grassroots-level selling, like I discussed, is going to be far more effective for the majority of you, and I really don't know which list to go on, but I know someone who got on a list, and she's running around responding to proposals, lowering her price and lowering her price. Sorry, not a great answer. Bill, I think Bill posted something here.

Liz: Bill has a question about how valuable it is to publish in journals that prospective and actual clients read.

Mitchell: I think it's incredibly helpful, because a couple of things. Remember, if you're the publishing type, someone who likes to publish, publishing is marketing. If you publish something, hopefully, you're publishing something that actually doesn't even matter. When I publish something, I like to think about which clients, what type of clients will read this, and how will this help them buy me? Once you've published, most publications will allow you to repost the article. You can take the article, repost it on your social media with some commentary.

"Hey, friends and network, it's Bill. I wrote this great article for *The Journal of Psychology*, speaking exactly with impostor syndrome for people who got newly promoted into an executive role in corporations. Anyone who has any question, anyone who would like to discuss this topic, I love this topic, reach out to me." Now you've got people reading the publication, but now you've also sent it out to your world, and one degree of separation from that, and that is marketing. I think you should do as much of that as you're comfortable doing.

I'll just add to that, Bill. By the way, thank you for being on camera. I can't even see who I'm speaking with. The other thing I would say is, you don't always need a publication to do this. Mitchell Schuckman, who's launching his own business in the next few months, I just wrote articles, and I just posted them on LinkedIn. I've done two articles that I posted just my own stuff. Of course, what did I do? For example, I wrote an article recently on team coaching. Why? Because I want companies to hire

me. I want my friends and their clients and their friends to consider hiring me to do team coaching.

I wrote an article on team coaching and posted it on LinkedIn, and talked about all of the great results. This particular story I told about team coaching, great results they've had because I coached them. Now, by the way, was it an exact replica of a team coaching session I did? Absolutely not. It was definitely plausible. Definitely something I was very comfortable owning. I didn't let the facts stand in the way of a good story. It was an article that I hoped would resonate with the people, not just in the publication, but in this case, it was anyone who was in my network. Long answer to your question, but I hope that helps. Any other questions? Liz, is there someone?

Liz: Yes, a question just popped up. Are you ready?

Mitchell: Yes, go ahead.

Liz: How would you handle a situation where someone questions your value, the value you bring to solving their problem?

Mitchell: Well, now, is this someone who's a prospective client or a client client?

Liz: Answer for both.

Mitchell: I'll answer for both. If a prospective client questions the value you bring, then you haven't done a good job explaining the value you bring. Just true. I'm not trying to be a jerk. Liz did say that I was a pretty straight shooter, so sorry, Liz. Here's the thing. You didn't do a bad job. You didn't come up with a value proposition that resonated with the person at the other side of the table. That's how selling works. Selling is like making friends. If you jive with a person, you jive with a person. If you don't, you don't. I feel like sometimes the reason people question our value is because of how we talk about our value.

I could sit there all day long and say, "I'm a CPA, and I run a business, and I coached, and I can sell." Great, that's my resume. Thank you very much, Mitchell. The real question, if someone's coming to me and saying, "I want your help." If Rachel Bone calls me up and says, "I want to grow my business. How can you help me?" I'm not going to tell you how many proposals I've worked on. If you want my background, I'll give it to you, or you can read my resume. What I'm going to say is, "Let me tell you a story, Rachel, about someone who was starting their own consulting firm. They weren't actually a psychologist. They were an engineer. Let me tell you a little bit about how I helped them grow their business. They didn't want to do this, they didn't want to do that. We talked about this. How does that resonate with you, Rachel?"

You're not likely to say it resonates completely. You're going to say, "Interesting. My situation's a little different." "Got you. Great. Tell me how it's different. Let me tell you how I can help you." That's how I would roll. Rachel, I see you raised your hand. See, I called on you and now-- but let me just follow up on the second thing. The second thing is really important too, Liz, and that is, if they're a client and they're questioning your value, it's very useful. I think it's pretty important to demonstrate to clients, to remind clients the value you're raising.

Look, if ultimately they don't want to use you anymore, they're not going to use you anymore, but I believe very strongly in sending out a note, or sending out an email, or sending up a-- if there's a set number of sessions and the sessions are done, I'll send a note. "This is what we've done. These are the issues you came with. We've addressed them effectively. I've seen you doing this and this. How do you feel about it?" Either they'll say, "Yes, it's great." They won't respond, which means they're not interested in it anymore, or they'll write back and say, "And this, this, and this," and then you just feed it right back to them, and you're showing and demonstrating the value. Rachel, over to you.

Rachel: I was just going to say that-- and my bias here is, my work focuses on how essentially stress impacts performance, and that intersection between operations and people, as I'm sure many of us on that last part can relate to. For me, what I found is I can be a really good storyteller when I am confident in my groove because I have a storytelling background from other careers.

When I am feeling insecure, self-induced usually, I lean on trying to prove my intelligence due to a number of reasons, which I went to therapy for. I share that just in case it's helpful for anyone else. I'm trying to be better at practicing what I preach and catching my own stress response of why am I fact-selling instead of trying to come up with these scenario examples to have on hand for when they ask me that question. I really just appreciate this discussion very much.

Mitchell: Just so you know, Rachel, since I spent my whole career in a big four accounting firm, that's all they want to do, is talk about how smart they are. "I'm the smartest person in the room." I'm like, "No, you're not. Sorry, you've got a whole world of smart people here." You win work by relating to people. Rachel, I would just add one thing, and then I'm going to check in with Lorenzo on Q&A and timing.

Rachel, I understand stress as well. What I would say is this, this is something you can practice all the time. You can practice with your best friend. You can practice in your head while you're doing a walking meditation. Just practice, have your stories, tell them like you're with a friend. The more you practice, the less stress you'll ever get, and then you won't have to go to that backup of stating your qualms. Anyway, practice makes perfect. Lorenzo, are we going to breakouts?

Lorenzo: We're still waiting on a few comments. Initially, it's Q&A is confirmed. We do have a question in the chat. If a client or prospective client brings up a conflict between career position and personal needs, a work personal life demands issue, is it okay to go with their need to be heard about the concern, or also coaching them on how they may resolve the conflict?

Mitchell: Is this a question about the appropriate subject matter for the consultation, or is this a question about sticking with the client's stated goals? What's the question about? We ask this question in coaching training all the time too. Where are you coming from?

Bill: It's my question. I'm Bill. I'm thinking of a specific example where I was coaching a physician, and I was also an internal consultant full-time. I had the organization as my employer to whom I was accountable, but the physician is expressing concern about the expectations as he increasingly takes on leadership

about his panel of patients hasn't decreased at all. He has two young children and a wife who's put her career on hold.

To me, it seemed very appropriate. That was what he most wanted to discuss at the moment, even though we had other really good exchanges on his role as a leader, and even specifics about that. I went with it, basically. We spent a fair amount of time just listening, and I came back and said, "Your daughters are going to grow up really fast. You're going to regret if you don't spend the kind of time that you want to being with them." I would confront the system, basically the organization and say, "I really am enjoying leadership, and you must have confidence in me because you keep giving me more, but I need a reduction in my patient panel, because there just isn't enough time in the day, and I'm not willing to sacrifice the commitment I have to my family.

[crosstalk]

Mitchell: Go ahead, sorry.

Bill: He was hesitant, and yet he did go ahead and do it. They said, "Oh, sure, cut your panel in half. We love what you're doing as a physician leader." In that instance, it seemed to work really well in our relationship. Even after I left that organization, he keeps reaching out to me.

Mitchell: The reason your question is a little bit nuanced, which I can't cover specifically, is the whole issue of you're an internal coach, but you were coaching someone, and where do your obligations lie? Also, remember, you're a psychologist, I'm an executive coach. It's different certifying bodies and whatnot. I will tell you just an example. I have a similar example, Bill. As an internal coach, I was coaching someone who had to grow their book of business, and I was coaching them one-on-one, and it got personal to something like yours.

I always believe that the coachee, or the client, or the patient, they come first, and it's also confidential. I think that generally they come first, and it's confidential. Now, if the person paying you, the company, had a different objective, I think you have to bring it back around. I think you have to bring it back around to the objective. If you need to go on a bit of a sidebar because this person has a personal need that's affecting how they operate in their capacity or coaching them, you got to go there.

Bill: I knew it was risky for me to some extent, but it just seemed like my commitment to him. Of course, I was concerned about the organization losing him because he was doing a phenomenal job as an aspiring and rapidly growing physician leader, and, of course, those are hard to come by too. He was very committed to his patients. The toughest part was which ones he'd let somebody else take. He had an awful time then reducing his panel. He didn't cut it in half, he cut it to about 60%.

Mitchell: Thank you, Bill. Any other questions, or what are we doing, Liz?

Liz: Mitch, I wanted to come in with one that had come up a few times with people I'd spoken to. It's one thing when you get an RFP or you get somebody coming to you. It's another one when you're trying to fill up your pipeline and you need to ask for

work. Not asking for the work, not asking for a specific project, but I'm going to a client, maybe who's stopped being a client for a while. Maybe we've hit a lull. Can you give a little bit of insight into how you approach a client and ask for work?

Mitchell: Great question. I like to view it-- I hope I don't get in trouble for saying this. I've got four sons, and they're all between the ages-- right now they're grown men, but when they were teenagers, they used to always ask me the same question, all four of them, "How do you make a girl like you?" I always said, "Don't talk about yourself, please. Ask them questions about them, and then talk about what they're interested in." I feel like it's the same thing here. What's the ulterior motive for my boys? They just want another date. Maybe a kiss goodnight. It's the same thing here, you're going to a client, you're asking them for work. I feel like you start by saying, "Hey, I've got a lot of things that are going on I'd love to share with you, and I'd love to explore if there are ways that I could potentially help you."

Then I think it's always good to come armed, again, to Rachel's point, not with your qualifications, but some stories you think will resonate with them because of who they are, where they're at. "Wanted to share with you, I'm doing some really cool work in this space. Hopefully, you come up with a story that really relates. You come up with a story, you tell them a little bit about something you're doing. You say, "How's it going over here? How's it going with you? Does that story resonate? Is there anything else going? What's going on?" They tell you something.

You got to get them to tell you something. "We're struggling with this," or, "I have someone who really needs help in this area. I've got a group of people that need this." You say, "Tell me a little more." Don't go into sales mode. "Tell me even more. Tell me, what would a good result look like? If this thing was dealt with over the next two to three months, what would the end game look like? If I could hand you a magic wand, what would the result be?"

Then say, "I think I could be helpful. What can I do to get the work here? I could certainly write you a proposal, but if you could tell me what it would take to get the work that could help you in something like this, I'm going to give it to you." I almost feel like it's a conversation. It's not desperation. Honestly, I'm a big believer of having a ton of irons in the fire. You need to just have these conversations all the time so that-- you know what the good part about doing it all the time is? When you have that one conversation where you really want the work, there's no desperation, because you're going to have another conversation next week with someone else.

I just feel like that takes a lot of stress out of the system, and allows you to just keep connections. It's part of being an entrepreneur. I know you guys just want to be helping people. I do too, but this is part of it. Without this, you don't get that. I feel like there was another hand raised.

Bill: That's really helpful. It's hard sometimes to just say, "What do I have to do to get the work? [laughs]

Mitchell: Oh my God. Yes.

Thor: I had my hand up earlier. [unintelligible 00:53:05]

Mitchell: Hey, Thor.

Thor: I was going to ask a little bit of the same of as what was just mentioned, but I'm also curious. I have been consulting for 20 years or more, and then I stepped away to do-- I've been working in AI for the last five years. I walked away from AI, and I find that it's been five years since I've touched any of those previous relationships and clients, so I'm starting from scratch, which is a lot of work. I'm curious if you have any reflections around that?

The other thing is that I was going to ask how to get in touch with Maura because my marketing advisor has walked away. She's gotten super busy with big ticket clients, so she doesn't have time, but I found her website, and I might look out.

Mitchell: Trust me, between Maura and Tammy, it's all the information's going to show up in the chat in a minute or less. [laughs]

Thor Legvold: I'm really essentially billing from scratch, without that huge established network already. I do have a newsletter on LinkedIn, I have been presenting at conferences, round tables, and other events, but-

Mitchell: Absolutely.

Thor: -[unintelligible 00:54:05] your ideas.

Mitchell: Listen, I love the fact that you're getting back into it. This is why the marketing is important, and doing it in a professional way is a big deal, because it really legitimizes you. I don't know any of you other than Liz. I don't know what your websites look like. I don't know what your social media posts look like. I don't know whether or not you accept credit cards or not.

I'll be honest with you. To me, they're all signs of legitimacy. When you look at someone's website and you can see that they were looking at YouTube videos and how to do Squarespace, and taking selfies of themselves and throwing up on screen, you're like, "Not legitimate." I'll say the same thing for social media posts. One thing people say about my social media posts, I hear it all the time. They read it, it meant something to me. Whoever wrote it was a genius. I'm saying that because Maura and Tammy wrote it, but I approved it. I corrected it when it wasn't really sounding like me.

It's important, not for nothing. I'm sorry, I know that this is a touchy issue, but I don't take credit cards, but you could Venmo me. I'm amateur. I know you're saving 3%, but to me, it's a sign of professionalism. I'm just throwing that out there for you guys. Thor, you triggered me when you talked about starting from scratch. To me, being as out there and professional as you possibly can be, to me is step number one. All the other things I talked about, like everyday branding, just add on top of that. I just answer it that way.

Thor: Thank you.

Mitchell: We have two minutes, Liz. Any other questions?

Liz: You know I have them. To that point about starting-- was somebody else's hand up?

Mitchell: No, that's-- [crosstalk]

Liz: Bill, did you want to?

Bill: I'm good.

Liz: On that line of starting from scratch, you just talked about going to a client, or a potential client, and say, asking for work. In addition to raising your profile and your professionalism with your network, how would you recommend approaching people in your network to ask them to refer you?

Mitchell: Great question. Honestly, I'm not really scared to do that at all. I do that all the time. I do that as part of everyday branding. You're speaking to a friend, and they're like, "I just took my son to a soccer game, and I can't believe they lost. My son really missed an open, blah, blah, blah. How are you doing?" "I'm doing great. Actually, I'm really jazzed up. I'm starting my own consulting business, or I've started my own consulting business. I'm doing a lot of great work helping a lot of people, including angry parents about soccer games.

If you can refer anyone to me, I'm game on. I have some openings. I love helping people. I love what I do. If you have anyone who might need any help, let me know. If you are unsure about whether I can help them, just ask." What's wrong with saying that? I'd say that to everyone. As long as I think you could pay the bill, I'll take you as a client. [laughs]

Liz: As long as it meets the floor. I think the last one I'll ask, and then I know we're at the top of the hour and we need to wrap-

Bill: We lost your audio.

Liz: -to be respectful of time.

Mitchell: Go ahead.

Liz: Oh, can you hear me? Okay.

Bill: Liz, we lost your audio.

Mitchell: No, I can hear you, Liz.

Liz: I'm going to try again and see if this works. The last question, Mitch. You lose the work, but you want to keep the relationship, you want to keep the client. How do you gracefully respond to being told no?

Mitchell: Look, we are all going to get rejected probably more than we get accepted of. Fortunately, you're all psychologists, you know how to deal with those emotional issues. What I would say is this, if you lose the work, you lose the work. I never lose. I either win or I learn. You can learn from every loss. Look, if it's someone you really, really wanted to do work with, like a company that you think you could add value at,

keep in touch. Whoever they hire is going to screw up at some point, and then you'll be the person who had kept in touch with them, and sent them tidbits, and sent them coupons for dog kibble, and you'll be the next person they call next time.

Liz: Awesome. All right. Last call. Anyone else before we wrap? All right. Then with that, Mitch, thank you.

Mitchell: You guys can reach out to me. I'll respond, Maura, she'll respond. We're happy to help anyone who wants the help.

Liz: Mitch, always proud to call you my partner. Thank you.

Mitchell: Thank you, Liz. Thanks for having me.

Liz: All right. I appreciate everyone joining. Thank you to all of our friends from Divisions 2, 18, 53, and anyone else who joined. We're so glad that we can provide value to our fellow APA members. Thank you, SCPS, for being here. Let's go to market.

[01:00:02] [END OF AUDIO]