



BATES INFORMATION SERVICES INC.

Making Yourself Irreplaceable: The Power and Magic of the Reality-Check Conversation

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You can download the slide deck and workbook, and view the recording of the workshop as soon as it's available, at batesinfo.com/aiip-workshop/

#

Introduction

Underlying assumptions for a successful professional services business:

- **Build your business around clients who NEED, VALUE and can PAY WELL for your services**
- **ATTRACT clients; don't chase after them**
- **Clients pay you for OUTCOME, not ACTIVITY**

OPERATIONAL THINKING (WHAT you do and HOW you do it)

CUSTOMER-OUTCOME THINKING (WHY your clients value you)

How REALITY-CHECK CONVERSATIONS Work

These are not sales calls! You don't know what your services are yet.

They are NOT email interviews. These are live (phone/video) conversations.

You need to have at least a half dozen conversations for a full market perspective.

Your goals:

- To learn **what you don't know** about your market—your unknown unknowns, unquestioned assumptions
- To find out what they need, value and will pay well for. How do **they describe their need?** You *must* find out how many zeros in a typical budget to resolve their need.
- To understand their desired outcomes—what does success look like? What's the **most important outcome** for them?
- Bonus point: Where would they find out about people like you? Social media? Conferences? Associations?

Your mission is to discover how people who expect to pay \$100+/hour for professional services talk about their needs.

Your approach:

- Open-ended questions, invitations to tell stories
- Look for opportunities to be surprised
- Challenge or validate all your assumptions
- ALWAYS find out the general size of their project budgets. "So, how much money would you throw at a problem like that?"
- If they ask you about your business, deflect! "The reason I'm talking with people like you is to find out where I can make the most impact for my clients."

Who Do You Have REALITY-CHECK CONVERSATIONS With?

People who represent your client base (or who you *think* your client base is)

At least two degrees of separation—not friends, former co-workers

Someone you meet at a networking event (but don't interview them AT the event!)

Thought leader on social media in your market

Leader in your clients' professional association

LinkedIn connections

and who you believe would be able to pay \$100+/hour for your services

Sample Email [or LinkedIn InMail or voicemail—know your market!] to Prospective Reality-Check Contact

Identify what you have in common / why you're reaching out to them.

Be clear on what you're asking for—a chance to learn about the key concerns of that person.

Don't pester—if no response to your request, move on to your next name.

If no response from five people, reevaluate your request. (I'm happy to give you feedback.)

Hi, Robin:

I was intrigued by your service on the board of ASTC **{i.e., why you're reaching out to this person in particular}**, which prompted me to reach out to you as someone who really understands this field.

I am in the beginning phase of a new business, and I am learning about what jury consultants **{i.e., people like this person}** are most concerned about. I value your perspective, and would really appreciate it if I could schedule a 10-minute conversation with you in the next couple of weeks to get your thoughts on the biggest concerns of jury consultants right now. Please let me know if there's a convenient time for me to give you a call.

I look forward to chatting with you.

Warm regards,
Mary Ellen

{my email and phone numbers, links to my LinkedIn profile and web site}

Conducting Your REALITY-CHECK CONVERSATIONS

Thank them for their time, **promise to only take 10-15 minutes**

Have open-ended questions ready. Use a customized version of:

- What's your biggest goal for the next 6 months?
- What's keeping you from that goal? What's frustrating you the most?
- What would you pay someone to help you achieve that goal?

Allow pauses in the conversation. Use encouragers: "Can you say more about that?"

Ask the scary questions - "Roughly how much budget would you throw at that?"

After 15 minutes (or more if the conversation is going well):

- Thank them for their insights
- Get referrals of others to talk with. "I've so enjoyed talking with you! Who else do you know who I should talk with?" (NOT "Do you know anyone else I could talk to?")
- Write a thank-you note

After each conversation:

- Write down your ah-ha's and surprises, and their budget
- Write down what the person NEEDS, VALUES and WILL PAY YOU WELL for
- Schedule the next conversation

It takes at least 6 successful reality-check conversations to inform you about the best way you can address the biggest needs of your market.

REALITY-CHECK CONVERSATION Worksheet

Name of contact: _____

Job title, organization: _____

Date: _____

Initial questions:

Summary:

How does this person describe their biggest need that I can address?

How does this person describe the best outcome/deliverable?

What is the approximate budget range for this kind of outcome/deliverable?

Who else did this person refer me to? _____

Need more support with making yourself irreplaceable?

My passion project is coaching both new and long-time solopreneurs, helping them make a living doing what they love. See more about how I might be able to support you at

batesinfo.com/services/coaching

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