



DIFFERENT WORKS

# RLI PROFESSIONAL SERVICES GROUP LEARNING EVENT PSGLE 103

Marketing and Selling  
Professional Services



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# Course Description

***Strategies for growing and selling have changed.***

Technology allows all of us to brand ourselves and build upon our networks, which leads to more exposure and more contacts.

Marketing and selling ourselves and our services can either be an endless state of activity or create defined tiers of productivity.

By creating opportunities to demonstrate our expertise, we build trust with potential clients – setting the stage for more successful sales.



# Marketing and Sales

- **Work together to identify the right people who need your service**
- **Your expertise IS your brand**

Marketing skills develop the relationship

Sales skills build the relationship and qualify the prospect

Structure builds interest and defines go/no-go decisions



# Expected Results

- Greater success overall
- Recognize your value
- Prospects seek you out
- Clearer decisions to drop certain prospects
- Increase your sales closure rate



# Learning Objectives

## Participants in today's session will:

- Learn strategies for promoting expertise.
- Gain an understanding of how to use these strategies to further develop business relationships.
- Study techniques to increase recognition in your field.
- Develop alliances to strengthen positioning.
- Discover when to turn away from prospects.



# Where Have We Been?

**In the past, we may have...**

- Bought databases;
- Mailed to prospects; and
- Waited for calls.



**Is your process still similar?**



# How Does It Really Work?

## Customers drive the sale, so...

- Select your bait;
- Manage price-driven prospects;
- Determine how far you're willing to go; and
- Seek commitment!



# Differentiators in the Sales Process

## Skills

- What is your negotiation strategy?
- What is the learning roadmap to get you there?

## Staff

- What support do you need?
- What is your staff comfort level with the process?

## Structure

- How accountable is everyone?
- How does it play a part in staff growth?

## Strategy

- Where do you want to be?
- How will you get there?



# Make Your Skills Work For You

Incorporate online opportunities and social media marketing

- **LinkedIn** – B2B
- **facebook** – B2C
- **twitter** *Pinterest* ...others?
- *Blogs* – Demonstrate your expertise
- *Email* – Touch prospects and clients frequently



# Demonstrate Expertise on **LinkedIn**

Develop your personal profile

Title

Summary

Skills & Expertise

Consider a company LinkedIn page

Build your network



# LinkedIn Sample Profile



**Tracy Acker, Pharm.D.** 1st  
Pharmaceutical Marketing Compliance Expert  
Washington D.C. Metro Area | Biotechnology

Current    The Acker Group, LLC  
Previous    Amgen, Inc, Reed Smith, LLP, Johnson & Johnson  
Education    University of Michigan

[Send a message](#) ▼

**415**  
connections



# LinkedIn Sample Profile

## Background



### Summary

#### EXPERTISE OVERVIEW

Regulatory Affairs - over 16 years experience in regulation of marketing and promotion of medical products, with experience at FDA, in the biotech and pharmaceutical industries, and consulting. Regulatory promotion experience with drugs, biologics and medical devices, as well as most therapeutic areas including a specialty in oncology. Proven ability to analyze and interpret efficacy and safety data.

Compliance - experienced in application of laws and regulations pertaining to healthcare fraud and abuse, continuing medical education, educational grants, sales force and medical science liaison compliance, state laws on gifts to healthcare providers.

Licensed Pharmacist - experience in hospital and retail setting.

Specialties: Federal regulation of medical product communications;  
OPDP/DDMAC Expert;  
Oncology Drug Promotion;  
Direct to Consumer advertising  
Scientific Communications  
Public Relations Campaigns  
Drug Advertising

To Contact Me: Call me at 301-219-2116 or email at [tacker@theackergroup.com](mailto:tacker@theackergroup.com)



# Consider Other Online Opportunities

- Respond to inquiries
- Let prospects get to know you better

facebook



- Develop a company page
- Add products, photos, and links

twitter



- Conduct research
- Send or receive information quickly

Pinterest



- Create a visual feast
- Promote visual components to services





Create Page

Now

2013

2012

2011

Like



HP About

### About

The Official HP Page. If you're going to do something, Make it Matter.

#### Mission

HP's mission is to invent technologies and services that drive business value, create social benefit and improve the lives of customers — with a focus on affecting the greatest number of people possible.

We welcome your comments and suggestions. HP respects your privacy. Learn more, <http://www.hp.com/privacy>

#### Company Overview

HP is a technology company that operates in more than 170 countries around the world. We explore how technology and services can help people and companies address their problems and challenges, and realize their possibilities, aspirations and dreams. We apply new thinking and ideas to create more simple, valuable and trusted experiences with technology, continuously improving the way our customers live and work.

#### General Information

Please be sure to check out our rules of engagement before commenting: <http://on.fb.me/VBy70S>

### Basic Info

Founded 1939

Products HP brings together a portfolio that spans printing, personal computing, software, services and IT infrastructure to solve customer problems.

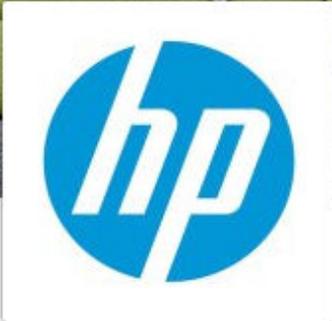
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- Services: [www.hp.com/go/services](http://www.hp.com/go/services)
- IT infrastructure: [www.hp.com/go/convergedinfrastructure](http://www.hp.com/go/convergedinfrastructure)

### Contact Info

Website <http://www.hp.com>  
<http://www.hp.com/supportforum>  
<http://www.hp.com/hpinfo/newsroom/recall...>

### History by Year

- 2012 ENVY x2 hybrid PC released
- 2011 Recycling Milestone
- HP Discover Kicks Off
- HP Labs Proves the Memristor Can Perform Digital Logic
- First All-in-One 3D Scanner and Multifunction Printer



Product/Service  
The Official HP Page. If you're going to do something, Make it Matter.

About - Suggest a Change



# “Multiply” Your Presence

Make connections

Build on them

Understand search functions

Pay attention to analytics

Determine your overall social media strategy



# Promote Your Expertise

- Share articles you write
- Post links to other articles
- Add slide presentations
- Highlight projects
- Provide URLs
- Feature awards and rankings
- Add photos that demonstrate your value

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RLI helps protect firms from a multitude of exposures through an innovative suite of property, casualty, professional liability products and risk management solutions.

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Serving architects and engineers

**INSURANCE FOR TECHNOLOGY PROFESSIONALS**  
Serving technology professionals

**INSURANCE FOR TARGET PROFESSIONALS**  
Serving professional services firms (miscellaneous professional liability)

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# Why Create A Social Media Strategy?

## Answer these questions:

- **Who** do you wish to reach?
- **What** do those people want to achieve?
- **When** should you interact with those people?
- **Where** should you interact with them?
- **Why** should you engage with those people?
- **How** can you really help them and make a difference?



# Start Putting It All Together



# Make Social Media Work For You

Here's looking at you, kid...

- Join groups
- Create curiosity - Who's looking at you?
- Validate your expertise
- Search for connections
- Share successes



# Add a Blog

## Do I Need A Blog?

- Who's going to read it?
- What my blog's purpose?
- What content can I incorporate?
- How does my blog increase search engine optimization?
- What else can I use my blog content for?

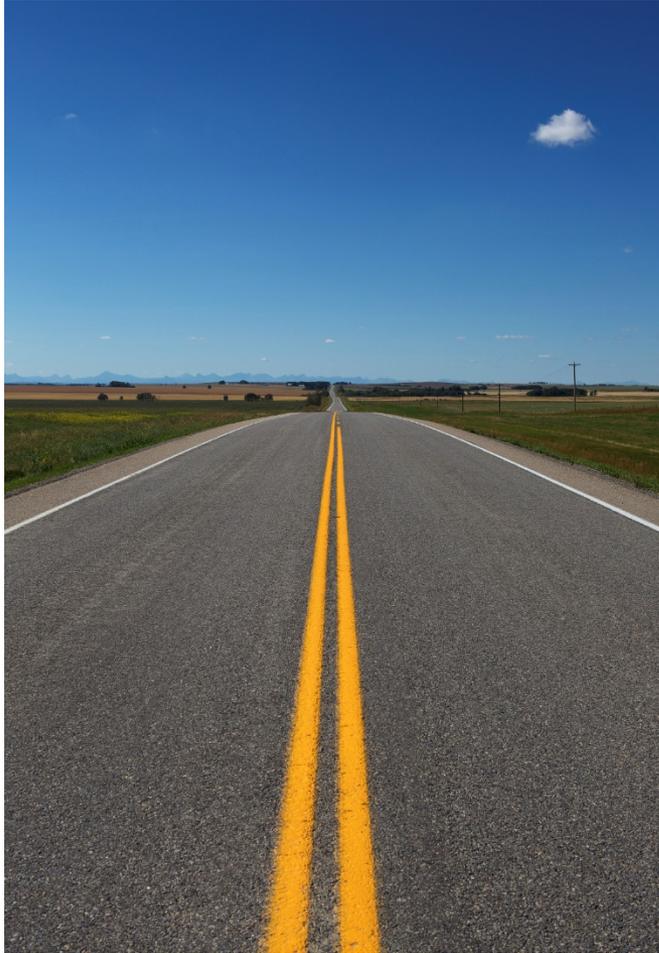


# Effective Email Marketing

- How do you like to receive information?
- Email is one good way to “nurture” your prospects.
  - May be the most effective marketing tool you can use, but
  - Be sure to do it right!
- Use a quality provider like:
  - Constant Contact;
  - iContact; or
  - MailChimp.
- CAN-SPAM Act – Play by the email marketing rules.
- Monitor content quality:
  - Don’t sell. Inform.
  - Consider including more than one topic.
- Review Analytics – your prospects give you clues!
- Offer newsletter sign-up.



# Follow the Sales Path



## Will my prospects follow my strategy?

- Start with an inquiry
- Anticipate the search process
- Provide recommendations
- Offer more information
- Make the commitment



# Make a Commitment to Succeed

## Important steps in developing your sales plan:

- Develop/improve your lead management system.
- Record your data.
- Back up your system.
- Enforce your budget.
- Track your time.
- Measure your ROI.



# Keep the Commitment

## Further considerations...

- Once a prospect is identified, strategically build rapport and trust.
- Determine how many steps prospects should take before you approach them to close a sale.
  - Make one of the following decisions:
    - Indicate your willingness to work together; or
    - Tell the prospect that you need a commitment to move forward.
  - Trust your instincts when those steps are exhausted.
- Exercise consistency – reach out to prospects and former clients regularly.
- Use email marketing to:
  - Educate and inform prospects; and
  - Remind them of your services.



# “Painless” (or perhaps just “less painful”) Sales

- Pursue quality referrals
- Gain recognition of your expertise
- Work with people you trust
- Network effectively



**Thank you for your time!**

**QUESTIONS??**

This concludes the Professional Services Group  
Learning Event

**RLI**<sup>®</sup> DIFFERENT WORKS

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THANK YOU!

