

Transform Your Networking

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Interview One - Eileen Levitt, the HR Team

Robert: This is Robert Middleton of Action Plan Marketing, and today, I am going to be interviewing Eileen Levitt, the owner of the HR Team, Inc., in Columbia, Maryland where she has been doing business for seven years.

I met Eileen just a few weeks ago in my two-day Marketing Mastery workshop in New Jersey. And, when we came to the section on networking and referrals, Eileen was a fount of information, ideas and strategies, more than almost anyone who I had met in a long time. Eileen had really perfected the strategy for getting more referrals to her business. So, I asked her to be on this call to enlighten us about what she does and how she does it.

So, Eileen, welcome to the call.

Eileen: Thank you very much.

Robert: Let me just start with an open-ended question about your business and how you got into this. How did you start to learn about how to get referrals on a consistent basis? How did that evolve?

Eileen: That was kind of trial and error. When I first started my business, I tried to do networking. I don't think I understood it completely. But, what I did was, I watched people who I thought were good networkers, watched how they worked the room. And then, I called them and said, "Hey, I've watched you. You're a fabulous networker. Can I sit down with you, pick your brain and learn what you do?"

Robert: So, you did very much like what I'm doing with you now?

Eileen: Yes. Yes, I did. And I took what they told me, and I tweaked it to who I am. Over the years, I've changed it, refined it and, I wouldn't say perfected it because I always feel like I can be doing more and achieving more. I'm never actually capable of

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sitting still. But, I've gotten smarter and have gotten smarter with how I network.

Robert: And you've refined your methods over time. Right?

Eileen: Yes, I have. I've refined my methods. I've refined the organizations I attend. I've refined the people I seek out. I've refined what I say. I've refined how I follow up. I've refined how I follow up with a follow-up. And, so on.

Robert: We're going to get into all of those as much as we can in this call. The thing that I want to emphasize to anyone listening, Eileen is going to give you her formulas and her strategies that came from years of refinement, practice and fine-tuning. What you need to do is take the ideas from this call and try to apply them to your business the best you can. But, nothing works exactly the same for every business. She is in an HR consulting business. You may be a coach. You may be a trainer. Nevertheless, the basics of what she has are probably a very good foundation to build from.

Where is the best place to start in this?

Eileen: Oh my. It's all a big circle though. Well, I can tell you, when I started my business seven years ago, what I did was, I put together a list of everyone I think I ever knew and proceeded to call them all and say, "Hey, I'm in business today." Then, I got together a letter and sent it out. I have to tell you, that resulted in zero business.

Robert: But, at least they now knew what you were up to.

Eileen: They knew what I was up to. They knew what I was doing. I shouldn't say it resulted in zero business. It didn't result in immediate business, and one thing that I have learned over time is that nothing results in immediate business. You have to be patient. You have to be patient with people. And, you have to

understand that what you do today, especially in networking for business, may not result in business for six or twelve months.

Robert: Did everyone hear that? It might not result in business for six to twelve months.

Eileen: I find clients that result from connections made two or three years ago.

Robert: So, the thing that I emphasize is, in networking, it's about building long term relationships where people know you, like you and trust you. It's not about going to one networking event, passing out a card and hoping everybody calls you. That's just Fantasy Land. It doesn't work at all.

Eileen: That's Fantasy Land. And, you know, it's interesting because there are people who tell me, "Oh, I went to that group once, and I didn't get any business." I'd chuckle and say to them, "First of all, of course not. Because no one saw you as a long-term player in the organization. And, too, more importantly, no one thing you do brings in business."

That's the thing that I've learned over the years, too. And, that's really key. No one thing you do will bring in business.

Robert: It's kind of synergistic, I say. You show up at things and then, you write articles. You get to know people and you meet them face-to-face. You're going to get into the specifics of that. But, people have to realize, it's a program of networking. And, persistence is extraordinarily important.

Eileen: They also have to realize, more important than anything else, the world is smaller than you realize and someone you may have spoken with ten years ago will remember you, and they will remember you if you were really nice or really mean.

Robert: So, be really nice.

Eileen: Be nice to anyone, even if you think there is no immediate gain, because ten years from now, you may start a business and they're going to remember you. And they are going to say, "I remember you. I made a sales call on you when you worked for XYZ Company and you were so nice to me."

Robert: And, if you weren't so nice, forget about it.

Eileen: Forget it. That's the one thing I didn't realize. I try to be nice to everyone. I'm not nice to everyone. But, I try my best. I worked in a corporate world for many years before I started this firm, and some of the people that are referring business to me today are people who were vendors. And, one of them who refers a lot of business is someone who made a sales call on me at the last company and didn't get my business. She is someone I network with today who herds a lot of business to me and I refer a lot of business to her.

Robert: Isn't that amazing?

Eileen: I've been on the other side. I can tell you, there are people who bring me in, follow up, I follow up with them, and I never hear from them again. That's interesting because I think, "Hmm, one day they may start a business and they are going to call on me and I will say, 'Yes, I remember you. You never called me back.'" I would never say that, but that would be going through my mind at that time.

Robert: That's right. So, we're reaping our karma all the time with networking.

Eileen: What's interesting is that there are people who made sales calls on me years ago and may have not gotten the business but appreciated the way they were treated, the way they were handled and are now good colleagues. So, that is one thing I particularly want to emphasize. You have to recognize your networking is building business through your reputation and that reputation has to be something worth living up to.

Robert: That's the foundation for everything. So, let's get back to what you did.

You sent out a bunch of letters to people and nothing immediately came out of that. What did you do next?

Eileen: I probably cried. But it really was a few years that I was in business that I still got upset. I called people that I respected as well, at that point in time. I said, "Could you tell me your secrets?" And they gave me some tips that weren't related to networking.

What happened was, within a couple of months I started getting calls from people I had worked with who had moved on to other companies and were calling me up, wanting my help. It was probably three months or so before that happened.

Robert: And how did those people hear about you?

Eileen: Because I had called them.

Robert: Just because you called. Right?

Eileen: I had called them. They knew I had left. I kept in touch with them. I knew that some people were leaving and starting businesses and I said, "If the need comes up, please call me", and they did which was great. Several people said, "I'm still used to you taking care of all these things, all these years. I couldn't think of anyone else doing this for me."

That was my initial business, people I had worked with. I had worked with a lot of start up, entrepreneurial organizations. So, a lot of people I had worked with had left and started their own businesses, were in positions of management in other businesses. And, they thought very highly of me and brought me in to meet with people who were in decision positions.

Robert: So, the lesson from this is, don't abandon any of your past relationships. Some people who are on this call may have left a company like you did and had past relationships. Some people might not have that many. But, whatever you have, you want to nurture them, stay in touch with them. Other things that I recommend, of course, are mailing things to people and keeping a mailing list. I don't even think you had a mailing list.

Eileen: I just had this really dorky looking letter that I wrote up. I didn't have a brochure at that time. I was in business for probably three or four years before I even had a brochure. I had a website that, I'm embarrassed to admit, I did myself. But, that was back in 1997 and the standards were different than they are today. So, I bought a book on HTML and had nothing else to do with my time.

Robert: That's what I did Eileen.

Eileen: My first website is brashly done today. It was different looking. But, I had a website and I referred them to it. I would call them. I had nothing else to do so I just kept calling the people I knew.

What happened was, a vendor referred me into a business that became a client of mine. They were evaluating payroll and asked me for a couple of payroll vendors and wanted me to do an analysis of the payroll products for them.

So, I did the same thing for a company I had worked for. I called the different payroll people, and that's how I reconnected with the person who has been rejected in the fire. And she, who was the queen of networking, was one of the people who I've learned so much from over the years. She sat down with me and brought in the other people from her organization. We all talked and they ended up referring a client to me. This is probably six or seven years ago and they are still my client today. And she connected me to people too.

That's how I expanded my networking circle initially. Then I realized, "Hey, this works." So, I started calling other people who I had already called and asked if they knew anyone that I might be able to talk to who might have a position of influence, may not need my business today, but might know people. And that's how I started building that network.

Robert: Let's give people the very simple script for that, so to speak. Let's almost role-play it, Eileen. I am past vendor, contact, someone who knows about you and you want to see if you can tap into my network. So, what might you say on that call?

Eileen: I might say to you, "Hey, Robert, I notice that we have businesses that have complementary client bases. I was wondering if I could sit down with you and see if we can network together and potentially pass leads or pass contacts that might be mutually beneficial." And nine times out of ten, people say yes.

Robert: I noticed what you did, Eileen. You didn't say, "I'd like to get some leads from you." You talked about passing leads and contacts between each other. So, in other words, one hand washes the other. At the same time as you are trying to get something from them, you're trying to help them in return.

Eileen: Exactly.

Robert: And, if you have very little to offer, you're not going to do as well. But, there are a lot of things that you can offer other than leads if you don't have leads. You might have some information, some ideas, some strategies. We always have something that we could help people with.

Eileen: We always have people we know that may have something complementary. For example, I ran into a woman who I've known for years. She has just recently started a business that does technology transfer, meaning that she works with government agencies working on different projects they have

and seeing how they can transfer those technologies into the private sector. I had zero leads for her. However, I do happen to know a woman locally who is a fabulous attorney, specializing in intellectual property.

So, I said to her, “You know what? I think that you should meet each other. There might be a mutually beneficial conversation.”

Robert: So, you couldn’t get leads, but you thought this other person might be able to or there might be networking between them that would be on a better level.

Eileen: Correct. So, I had a hard time getting her leads. But, the reality is, we all know that if you’re taking companies and moving them to the private sector, there is potential opportunity for me. Did I say that? No.

She was so thrilled. She asked, “What makes you think of that?” And I said, “This is what I do. Let me know how it goes and keep in touch with me. I want to know how it works out for you.”

Robert: So, for anyone listening to this, you’ve come back to the first step, which is you want to list everybody you know. And then also, think of what the potential connections are with those people. “Well, that person can help me directly.” “Maybe that person is indirect. They are really big in this industry. Do I know anyone else in this industry that I could hook them up with?” You’re sort of going on a case-by-case basis.

Eileen: If I’m meeting with someone, I’m always thinking, “Who can I connect this person to”, even if they didn’t ask. If they haven’t asked to be connected with people I say, “You know, I know so and so. Do you know that person? They might be a really good fit for you.” I’m always thinking of that for people.

Robert: So you become a networking catalyst in every situation. What does this cost you, Eileen?

Eileen: It costs me absolutely nothing.

Robert: It just takes a little time and attention to this, putting your focus on something, because you're talking to that person anyway. You've met them wherever you've met them. So, you're always thinking, "How can I help them?" And you're providing connections. That makes them remember you for a long time.

Eileen: It does. The other thing is, you have to recognize when you do that, you can't say to the person, "When you get leads, pass it to me." That's not very nice. You have to give with no thought for gain. Because, the reality is, people give to people who they have gained from. The other reality is you have to give more than you get.

Robert: That's just the way it is. Right?

Eileen: You have to give more than you get.

Robert: If you go around thinking, "Gee, I gave three leads last month and no one has given me anything", you're not getting it. The point is to get out there and give more.

Eileen: Give more and make people feel good about you, and warm. Make them think, "Oh, Eileen gave me three leads. I'd better think about how I can get her into some places I'm in." I've had people say, "Oh, Eileen, I have to think about where I can get you in." And I say, "Think all you want. Let me know and I'll be there."

Robert: You know, I had a client, someone who had attended one of my workshops years ago, and I did a little bit of consulting with him, helping him with his marketing and really got him rolling. And, because of that, Larry hooked me up with about a half dozen chambers of commerce that he happened to be a member of. He was quite a networker himself. And he got me speaking engagements with all those groups, and that connected me with dozens of people just because I'd helped him in his business.

So, you never know. Sometimes, you'll connect with someone who is a real connector themselves. That stuff really comes from that person. You never know who that is going to be.

Eileen: People say to me all the time, "Gosh, I have a hard time thinking of how to pass business on to you." And I say, "Oh, please, you and I both know the one thing business owners love to complain about, their employees. So, when you hear them complaining about their employees, just say, 'You know what? Instead of complaining, talk to this person.' If that's all you do, I'll be happy."

Robert: That's brilliant. So, essentially, that's sort of a sophisticated version of our audio logo. Isn't it?

Eileen: Exactly.

Robert: In the audio logo, we say, "We help people who have such and such a problem." But, when someone says, "Gee, I don't know how I can pass someone on", you take that same message and turn it around. So, I would say, "Hey, no problem. But, if you find an independent professional who is complaining about having a hard time attracting clients, have them call me or send them to my website and get some of the free information on the website." And now you've instructed them exactly what to do, and they will remember that.

Eileen: Right. Because you and I both know that there isn't one business owner who isn't struggling with marketing, and there isn't one business owner who doesn't complain about his employees. Every business owner loves their business and then they realize they have to manage employees and it doesn't work.

Robert: They do marketing and a million other business things that they never got much training in.

Eileen: So, when I tell people that, they say, “Great!” I take the pressure off of them. That does help a lot.

Robert: No matter what business you are in listening to this recording, there are some people who need your services or you wouldn't be in business in the first place. That could be helping people with meetings, or increasing productivity, or some technical thing. It doesn't really matter. If you are connecting with people in your field that have cross connections and you clearly explain this problem and issue, you've done your job. People will remember.

Let's go back to the things you started to do. So, you started to make a few of these connections.

Eileen: Right. I joined organizations.

Robert: How many?

Eileen: Over the years, I've belonged to a lot. I don't know how many I currently belong to. I probably belong to six or seven, maybe even ten. Some I just belong to because they're industry organizations, I may not attend their events, but I need to keep current in my industry. I've cut back on some things because I just didn't feel they were connecting me with the people I wanted to connect with. It's a trial and error thing. You have to give it time.

Robert: It's like dating.

Eileen: It is like dating. But, remember, with dating usually you can go on one date and know. But, sometimes you have to go on more than one date to figure it out.

Robert: You don't have to belong to the organization before you check it out.

Eileen: It will always let you pay a little more. Like with chambers of commerce, the lunches attract a different caliber of person than the after-business networking events.

Robert: Then, you might discover they are better or worse than the evening ones. So, you find the one that is right for you.

Eileen: Exactly. I have, over the years, also determined the people I want to network with are bankers, CPAs, lawyers, insurance sales people. So, I generally will try to target meetings that attract those types of people who serve a certain type of company.

Robert: So you're not necessarily networking with people who are direct clients of yours, but people who can be referral sources of yours, and building a relationship with those people so that they are referring their kind of clients.

Eileen: Right. if I go to a meeting and meet someone who is a potential client, that's great. If I go to a meeting and meet someone who has ten potential clients, that's greater. Now, obviously, the direct connection is fabulous. But, it's very rare you are going to go somewhere.

And the other thing is, if I'm introduced to someone by a trusted CPA, by their trusted banker, by their trusted whatever it is, I have instant credibility. Last week I met with an organization that when they went out and sought someone who does what we do, we were referred to them by their banker, their insurance agent, their CPA and I forgot who else. But, there were four different people they had called.

Robert: And you were the top of mind for all these people?

Eileen: I was the top for all four.

Robert: And you can start to understand that if that happens, then there isn't any other alternative. They don't call anybody else. It just isn't going to happen. You've got the job.

Eileen: We have the job. I'm very fond of the Jerry McGuire line. "You had me at hello". We sold them, but this doesn't mean they're going to sign on the dotted line tomorrow. You still have all the other sales processes, price and all that. But, if we don't do it, no one else will.

Robert: What I like to say is, "Now it's yours to lose." Because you already won their trust. They're interested, and if everything goes well, there's a good chance you will work with them.

Eileen: I've already won their trust. And I asked them who else they are talking to. They said, "How could I possibly talk to anyone else when my banker, my attorney and all these people are telling me that you're the person to talk to." So, that was very nice to hear.

Robert: This doesn't happen every day. But when it starts to happen, you really know you have some momentum.

Eileen: It was a little spooky, but that's okay.

Robert: And you also know that you're traveling in the right circles, with the right networking, meeting the right people. Because a network is a web of interactions. Everybody knows everyone else in this given geographical industry area. It's only two or three people removed. It's not five or six or seven. It's like, "I know someone who knows someone who knows the client."

Eileen: Exactly. Now, what's interesting is, the insurance person who was a vendor, was someone who I've known for over ten years. He was a vendor of mine in another organization that I worked at. So, life does go full circle.

I had belonged to another chamber of commerce and just determined that the people weren't good connections for me. I belonged to, at one point, probably three women's organizations and realized that one of them worked for me. Initially, I kept in it because I enjoyed it, not because I thought business would come from it. But, eventually, business did come from it because I joined the board of directors. And then, business started coming in.

So, the other key to networking, many times, is when you become part of boards of directors, it establishes credibility for you with other members. And, as you become more involved in the organization, other people on the board get to know you really well.

Robert: Again, that takes time. You can't join an organization and be on the board tomorrow.

Eileen: You have to volunteer for activities. You have to exhibit that you are a good team player, that you get things done, that you follow through. Now, I will tell you that where I am, most non-profits are starved for people on their boards. So, there are very easy ways to get on the board. Membership organizations are harder to get on the board than non-profits that are serving the community and whatnot.

Robert: You could spend your whole life on those.

Eileen: Those are different. And there are people on those boards who are bankers and all of that for me, and I benefit from it. But, I belong to three women's organizations and I decided to drop back from two and just stay with one. My general feeling is, if you're a woman, a minority, join an organization that you can relate to. Because there are people there who may be more willing to refer business to you.

Robert: I want to tell a quick story about the best networking I did. It was when I belonged to IMC, Institute of Management

Consultants, when I lived in San Francisco. I was a marketing consultant, not a management consultant. But I still fit in. And yet, everyone there was a potential client for me. I got active and was on committees and did presentations.

There's something else I did. I invited my clients to come to IMC because I said, "This is a great group for you as a consultant." So, I get a lot of clients to come and join. And then, people would ask how they found out about IMC and they would say, "Robert Middleton." So, I had become prominent just by being very active and getting other people to join the organization as well. It was extremely successful. I looked around at a meeting once and realized that at every single table, there were at least two of my clients.

Eileen: That's true. I've been to organizations where I have brought clients in. And, it's nice because many times, when they ask, "How did you get here", they say, "Well, Eileen Levitt does business for us." And it does give you credibility.

Robert: Yes. And immediately, they are selling you, which is, "Oh, how is she? What does she do? I've met her". Then they say good things about her and what could be better.

Now, let's get back to the face-to-face meetings because my sense is, that's a very important part of this. If you just go to things, meet the right people, talk, etc., it's not enough. Why are face-to-face meetings so important?

Eileen: First of all, when you're at those networking functions, you have a very short period of time to meet people. But, what happens is, they're not going to remember. They're going to take your card and put it aside. So, what you have to do is, you have to follow up with them, call them on the phone, pop them an email, whatever it is that you're comfortable with or both. Call them and say, "I enjoyed meeting you. I'd love to sit down with you and talk about how we can establish a mutually beneficial relationship." That's what I say every time.

Robert: So, what do you usually send them?

Eileen: It depends. Many times, what will happens is, at the networking event, I will tell them, "Boy, what you're doing sounds really neat. I'd like to follow up with you afterwards and talk to you about how we might be able to have a mutually beneficial relationship. How would you like me to follow up with you?" I get from them what they want from me, and if they're open to that. So, there I'm going to make a determination of whether I send them a letter, an email, a brochure or call them.

Robert: Or an article or whatever.

Eileen: Whatever it is. From there, I'm going to get a feel for what their method of comfort is. That's going to vary. Sometimes, I've met someone I don't necessarily think I'm going to meet with because it probably isn't a fit. But, I enjoy talking to them. I have a set of note cards I got at the party store. I have two; one with my name on it and one with my company name on it. I pick and choose the most appropriate one. I'll put a little note to them saying, "It was a pleasure meeting with you. If I can be of any assistance in the future to you in any way, please give me a call." And that's it.

Robert: Because if you try to do a meeting with everyone you met, that's all you'd be doing. So, you have to pick and choose to some degree.

Eileen: It's going to vary. I belong to an association for corporate growth and we had a breakfast meeting this morning, at 7:30 in the morning. I determined there were three or four people that I wanted to follow up with. One person explicitly told me he wanted to follow up with me. He was actually a potential client, not a networking person. He said, "What you do is what I need. I want you to come in and talk to my partners." He said he was going to give me a call in the next week. I didn't want to call him. So, I just popped him an email saying how much I enjoyed meeting him and looked forward to hearing from him. Because

I'm not going to call someone who says they are going to call me.

Robert: If he doesn't call you in a week, then you can call him.

Eileen: Exactly. Then, there was a banker that I met who was just phenomenal. We were talking about who we knew. He said that he wanted to get together with me in the next week or two. So, I had popped him an email saying, "It was great meeting you. Can I take you up on your offer to meet with you and the other people you had mentioned? Let me know what's good for you in the next few weeks." I also put in a P.S., "I also put my brochure in the mail to you." He actually responded back in about fifteen minutes and said, "If you don't hear from me by this date, give me a call." That was great.

Robert: He'll get your brochure, look at it and finally it will click and you will meet.

Eileen: There were plenty more people. One person I called and got his voice mail and then sent him an email. The CPA asked me to send my brochure. I sent him my brochure. But, I also sent him an email saying, "As you requested, I mailed you my brochure. I'd love to get together anytime in the next few weeks. What's your availability?"

Robert: Sometimes, they're asking for a brochure as a put off, but it wasn't in this case.

Eileen: Who knows? So, I figured, I walked out of there with four good people that I spoke to. That's a good meeting.

Robert: A very good meeting.

Eileen: Now, I had probably fifteen business cards in my pocket. But, I determined that there were nine people who aren't going to remember me by next week.

Robert: So, by your attraction at the meeting, you get a sense of who they are, and those are the people who are the ones to follow up on.

What I've noticed over the years of networking is that most people aren't very good at this at all. What we do is, we go, we talk, we exchange cards. And, even if there's a strong connection, we often let it fall through the cracks.

Eileen: That's not good because people are going to forget you. If they don't hear from you within a week, they have forgotten you. And quite frankly, I said it was fifteen people. I'm not going to send them all notes and cards because it's very silly. But, the four that I determined were good and we spent time talking, yes, absolutely. The other nine, I probably won't send them notes people will get overwhelmed with my notes.

The thing most people ask me is, "Well, how can you go to these things? There are so many people there. You walk in and people are talking. How do you interrupt conversations to talk with somebody? How do you do this that?" What I tell people is, "When you go into a networking event, if you're standing around, chances are there is someone else standing around, looking around for a conversation to break into as well. When you walk in the room, immediately seek out that person, walk up to that person and introduce yourself."

Robert: Yes. And they will be grateful that you did.

Eileen: And then, the interesting thing is, after four or five meetings, you start to know people in that group. And you will start to feel comfortable because they will start bringing you into conversations. "Oh, here's Eileen. She just came in." And they bring you into a conversation. "Eileen, we were just talking about something you might find interesting." People get comfortable with you.

It's interesting because I talk with people, especially women, who are very uncomfortable walking into a room of people. I have to tell you something. The Association for Corporate Growth is national, but in our local chapter, I think there are four women members, myself included.

Robert: So, you stand out like a sore thumb.

Eileen: Well, I personally see that as an advantage. I think that, heck, they're going to remember who I am. I don't see that as a negative. But, there are people who do. I can't change that.

But, what I tell people is, "You know what? If you walk into a room where you are a minority, people will remember you." And, it's the same thing for women's organizations that I belong to. I encourage men to attend. They say, "Well, that's a women's organization." And I say, "No, it's an organization that promotes women in business."

Robert: And usually, they have no problem with men coming.

Eileen: They ask if they can join and I say, "If you can't join that organization, then they're no better than people who exclude other people in the past. So, if you don't want you to be there, then they will tell you."

Even though I say you should network with people you are comfortable with, you are most like initially, don't be afraid to go and reach out to people that you're very different from.

Robert: You really can't judge. You never know what connections you will find. And by going a few times, it's like dating, you'll discover if there is chemistry or not. If there is, continue, join, participate, discover the possibilities. If not, find another group. There are so many different organizations. There are professional groups. There are different chambers of commerce. There are alumni associations. There are women's groups. There are financial groups. You name it. It's endless.

Eileen: Exactly. And I'm on the alumni council for where I went for my undergraduate degree. And that has turned into some very nice connections for me. The best thing about an alumni group is people, because you went to the same school as them, they have credibility with you.

Robert: It's sort of an automatic association.

Eileen: I find that very helpful. The other way I network with people is, if I go into a potential client, into a meeting, I will always ask them, "Who do you do business with?"

Robert: Is this a face-to-face meeting?

Eileen: It's a face-to-face meeting.

Robert: Let's get into that. I want to set this up a little bit for people.

We've talked about, you could initially connect with people...Like, say, you haven't done much networking or you're just starting and you want to reach out to some people. You make a list. You figure who are these people? They just know what I'm doing. And, who are these people that I think would be worth meeting? You call them. You say, "You know, I'm starting and I'd like to see if we can help each other in some way and have a mutually beneficial relationship." You set up a meeting.

If it's through networking, they don't know you from Adam to begin with. But, by connecting, talking, exchanging cards, sending some information, and if there is an interest, there is a good possibility. I can't tell you how few times anyone has said, "Gee, I'd love to meet with you, Robert, and sit down and mutually discover how we can help each other."

So, it's not that fifty people are trying to do that with everybody. Often we say in meetings like this, "Everyone is selling. No one is buying." But, that doesn't really make a difference in this case

because everyone wants to make connections. And so, even though they might not be a potential client, you still can connect with them.

Given all of that, there are all these potential people who you could meet with. So, you set up the meeting and it's over coffee or over lunch. You sit down. And, tell me how you set this up and some of the things you have learned to get referrals or people to connect with you through those meetings.

Eileen: I ask people a lot of questions like what they do, how they do it, who their ideal client is.

Robert: So, you find out about them first.

Eileen: Sometimes, people are also sophisticated networkers and they've called me for information. So, it's always interesting how these meetings go.

I get some information. And then, typically, they may ask me questions and I provide them with information and I tell them what my ideal client is, what they look like, how they are going to be. Some people will say, "Well, I don't know if I will be able to come up with leads for you right away." I say, "It's not a problem. Don't worry about coming up with leads right away. The opportunity will land itself when it's there."

Robert: So, you let them get off the hook. No big pressure.

Eileen: But then I offer them, "But you know what I would also like from you? I'd like to know who else you network with that has been beneficial for your business that may also be beneficial for my business." So, from there, we usually start exchanging names back and forth with people. I will generally give that person a call and say, "Hey, I gave your name to so and so to network with. Expect their call." Sometimes, people are quicker than I am. So, you never know.

But, that has resulted in some good business for me. That networking, networking, networking connection.

Robert: One person leads to another, leads to another. And that final person...

Eileen: ...leads to a client.

Robert: ...leads to a client and maybe many clients over a period of years. You just never know.

Eileen: Right. And then, when the connection leads to a client meeting, I actually, at that client meeting, ask the client who they do business with. If I determine this is a company that I think I would be a good fit in terms of demographics, I am going to say, "It's interesting. I'm just curious. Who is your accountant?" They will answer and I will say, "What do you think? Is he any good?" Well, if they say yes, I will say, "You know what? I have a lot of clients who look for a really good accountant from time to time. Can I get his phone number?" If they say, "No. We don't really like our accountant", I will say, "Oh, I'm sorry to hear that. I happen to know a lot of accountants. Would you be interested in someone who I know maybe calling you or you calling them?"

So, for me it's a win/win. I either walk out with a name or I am able to refer someone I know into that organization.

Robert: That's great. It sounds like, for you...

Eileen: I won't be obvious. I subtly ask them. When they bring things up, I will subtly ask them, "Who does that for you?"

Robert: So, it sounds like, for you, there is no meeting that doesn't have some possible additional connections coming out of it. There's never a dead end for you.

Eileen: Right. I was at one yesterday where I was one of seven people in there. But, you never know.

Robert: I remember face-to-face meetings I had with people over ten years ago. I've also gone into meetings that were just for networking purposes, it was through the San Francisco Chamber of Commerce, and at the end of the meeting, a person said, "You know. I think I need you." I wasn't even expecting that. And, "Can you help me in my business? I need some marketing assistance."

The other thing I found is that we really often prejudge about who a person is and what they know and what they can do. And that is sort of a barrier between them and us. And that can break down very quickly in a face-to-face meeting. Like, "Oh, I didn't know that. You know so and so, and you do this." And you can end up giving them a lot of names, or they can give you a lot of names. And you would never have known that it could go that deep just from a face-to-face quick meeting in a networking situation.

Eileen: And then, generally what I will do is, after I've met with a person, in person, I will submit a note, "Thank you for your time. I enjoyed meeting with you and look forward to our relationship." Then, if they referred me to someone who referred a client to me, I will go back and do the chain thing. "Thank you so much for referring so and so to me. She referred a client to me and..." So, I will keep them in the loop of all of that which gets a little dizzying sometimes. But I use ACT now to keep track of all of that.

Robert: That's a good computer program where you keep records of what you've done and notes that you've sent people and letters you've written them if you've done that kind of thing.

Eileen: I have a lot of templates that I've saved in there. So, I can use that. It has a space for "referred by". I can put notes of what I did so when I come back from a networking function, I will put

them in the computer. They may have mentioned something about whatever it is. I'll put that in this computer.

Robert: So, you can really keep good track of things that way. Can you give me a sense of how many meetings or hours you might spend in a week or a month, not face-to-face, but networking type association meetings. Do you go to something usually once a week or more than once a week?

Eileen: You have to realize that I have five mouths to feed. So, I'm the only person doing sales here. So, in any given week, I will attend anywhere from one to five of those types of things. It depends on the week because there are some organizations that have monthly meetings. Like, this week, I've had three of those.

Robert: Three in one week. So, it's not about joining one organization and going to one meeting a month. There has to be a certain volume. What I've found in my business, I did a certain amount of networking. I got so busy that I didn't have time to network anymore. I got to that place. That might happen to you.

Eileen: That happened to me at one point. But, then, I realized that the pipeline was getting slim so I had to get back in it.

Robert: That's right. And you have a bigger than one-person business, and you are doing a lot of the selling. If you're doing lots of billable hours, you might not have quite as much time to network. But, the thing that you have to do is, it can't be episodic. It has to be a program. If you belong to a group and you like it, and it's working for you, keep going to it. Go to it at least once a month. And don't let three or four months skip. That's often what people do when things get busy. That's a big mistake.

Eileen: It is. And I've fallen into that trap, myself, in the past. The nice thing about these networking meetings is they're usually very early in the morning or in the evening, or they're at lunchtime.

So, they are times...you have to eat lunch. You have to eat breakfast. You have to eat dinner. So, they are typically going to be times when you can space them out. The one I went to this morning was over by 9:00 a.m.

Robert: It doesn't have to take a huge amount of your actual day if you plan it carefully and they are not too far away.

Now, how about face-to-face meetings? What's typical for you in a week?

Eileen: Anywhere from two to six.

Robert: So, it's not, "Gee, I'm meeting people. I met two people last month." It's probably just not enough especially when you're starting.

When I started my business in 1984, I used to network like mad. I went to everything. I led an organization that did two meetings a month. I belonged to the Chamber. I was everywhere, doing everything. I didn't know a lot of the things that you know now. I wish I had. I would have grown a lot faster.

Eileen: Well, I wish I knew what I know now seven years ago.

Robert: But people listening to this, really take this to heart.

Did you have any particular resistance or fears or trepidations or hesitancy about networking? Or did you just jump in?

Eileen: I am an extrovert. Are you shocked to find out that I am an extrovert?

Robert: No. (laughter)

Eileen: I know there are a lot of people who do what I do very well and are introverts. Let me tell you the difference. The difference is at

9:00 a.m. when I left that meeting this morning, I was energized. I was psyched. I was like Popeye eating spinach. People who are introverts would be very tired. So, I think being an extrovert helps.

Robert: And that's not something that you can just change. I found that there are probably more introverts than extroverts. But, if you give this time and you go to a group, what you said earlier is very true. You get to know these people and it becomes like your community. And it's not like a bunch of strangers. What people hate is, "Networking is just a lot of strangers." Well, if you go consistently, get proactive, get involved, meet face-to-face with some people, before two long, three, four, five months, you've really started to build a community where people like you. You like them. And all sorts of possibilities start to come out of that, that just can't come if you just do the minimum amount. You never get deep enough into it to create those relationships or get comfortable.

Eileen: I know there are people like that. Because I can see them at meetings. They have a lot of trepidation with walking in the room. So, someone like me, I do seek them out and bring them in. But, everyone doesn't do that. I know that I'm an extrovert. But, I can tell you I wasn't necessarily always extremely comfortable walking in the room because I didn't know the people there. It did take time to have that confidence. Just because I walk up to a stranger and talk to them doesn't mean that I talk to them confidently.

I will also tell you that I'm a big fan of Dale Carnegie. And his book, "How to Win Friends and Influence People" is a great book. You can buy it in paperback. It's got great tips for people on meeting people, on memorizing names and all that kind of stuff. There's nothing wrong with sitting down and reading that and it giving you that confidence builder that people need.

Robert: Yes. And there are other really good networking books out there. I'm a big advocate of this. I'm very much self-taught. So, I

will pick up a couple of books and read them, and get tips and strategies all fitted into a plan and then I will try things out. That can save you a lot of time.

Eileen: It can. I also have to say that I grew up in a sales environment. My father is a salesman. I think my entire family is into sales. So, even though I...

Robert: You picked it up by osmosis.

Eileen: I picked it up by observing people there. So, I have to say that a lot of the things that I've done are things that...when the bottle came out, that stuff came in. But, I can tell you that my father, who is a sales person, didn't grow up in a sales environment. He's probably the best sales person there ever was. He didn't learn that from his family.

Robert: He wasn't a natural sales person, but he persisted and he learned and he became good at it.

Eileen: He got hit on the head a lot. I make mistakes all the time. And you just can't look at those mistakes you make and give up. You have to just learn from them and improve what you're doing. I've made mistakes in networking. There are people I've met. They remember me, and a month later, I see them again and I can't remember who they are. I know I've met them but I can't remember. And they remember everything about me.

Robert: Yes. And, you can't remember them from Adam. That's just the way it is.

Eileen: That's happened, or you put your foot in your mouth. I'm good at that. It happens. I don't worry about it.

Robert: So, Eileen, if we were going to underline the main, important things of this conversation, I would say, number one, find ways to reach out immediately. Often, what I say is when you get an article together, think of everybody on your list. Call them and

send them the article. That's a reason to call them. Some of those people you may meet face-to-face, and you really can start things rolling from there.

And then, join networking organizations. Find the best ones. Practice what we've talked about, and really think of the purpose, in a way, of those meetings, as the bigger meetings to set up the one-on-one meetings. If it's just to go, it's not enough. But, you can leave with three or four cards of people who can turn into meetings that are good, and make progress.

And then, in those meetings, be very productive in seeing what you want to do. Find out about them. Tell them about yourself. Tell them how to refer people to you. And then find ways to keep in touch with people. I think one of the best ways to do that is to have an email newsletter and say, "You know, I have a newsletter. I'd love to put you on the list. It will keep you informed about the things I'm doing. I'll keep you in mind regarding so and so and such and such. I look forward to seeing you at next month's meeting as well."

So, you have many tendrils there. You have connections through email, through letters, through meeting face-to-face, and sooner or later, something comes out of that.

Eileen: And I do find that the number of people calling in with referrals does go up around the time period that the newsletter goes out. It's just fresh in their mind. "You know what? I got your newsletter today. I've been meaning to call you." It prompts them to call.

Robert: Yes. Any other major tips that we would be remiss if we missed out? Maybe there are a couple more things, or maybe we said all we could say for this meeting?

Eileen: Well, follow up I think is really important. I like personal thank you notes. I like to ask people... I do get referrals from existing clients and I do call my clients often. Because I'm not inside

always doing the work. So, I do call them often to see how things are going and remind them that we love referrals.

Robert: What specifically might you say? Often people say, “Gee, I have a lot of happy clients, but I can never ask for referrals. I never seem to find the right time. Or I’m embarrassed doing it. Or I don’t know what to say.” What do you say and what do you find works?

Eileen: Typically, what I will do is, I’ll ask when they say we’re doing a great job. If they say we’re doing a bad job, I’m not going to ask them for referrals. Fortunately, that almost never happens.

But, typically, I like to take people out of their office and take them for lunch. I may call them up front. But, I will take them out of the office and take them for lunch and talk about things.

Robert: So, it’s not over the phone that you say, “Oh, by the way, have you got some referrals for us?”

Eileen: I do sometimes. But, the reality is, as soon as they hang up the phone, they’ve forgotten because they’re doing whatever stuff. There are emails coming in and all kinds of things.

Typically, I will thank them for their business. Ask how they are doing and I will say to them, “Hey, if you have any clients or colleagues that are in need of our services, please keep us in mind. We’d love to hear from them.” Sometimes, they will act hard, and I say, “That’s fine. But, if you ever hear anyone mention, as business owners do, that their employees are this or that, I would love it if you could pass our card or tell them they could go to our website or get a newsletter or something of that nature.” It’s a very low key hit. I probably could be higher key on that.

Robert: Do you sometimes ask for connections like you do through networking? “Who do you know that maybe I should meet with?” Does that come up sometimes?

Eileen: I don't do that with clients. Because they'll do that too. I certainly ask them about who their accountant is, who their lawyer is. I find that out from them up front.

Robert: They've already mentioned connections.

Eileen: When I'm in there on an initial sales call, I get that up front. I also say to them, "Also, if you need referrals to anyone who does services or products, we like to keep in touch with our clients and who they are using and works well for them. So, please let me know."

Now, the one thing I will tell you is this. The whole networking world, in referring back and forth, you need to make sure that the person you are referring to does a good job. Because that is a reflection on you. I can't stress this enough. There are people who belong to these networking groups. And they say, "You have to refer everyone in this group." Well, if you know that so and so doesn't do a good job, you cannot refer that person to your client. You have to keep that in mind. You have to know that person you are referring to them does a good job. And you have to be confident in that.

I have asked people who have approached me to refer business to them, for references. And I am not shy to ask for that. There's a woman from three months ago who still hasn't gotten me any references. That tells me more about her than anything else.

Robert: So, if you ask them and they won't give you references, that's not a good sign. But, if they said, "Oh sure. I'd be happy to" and they send you an email with half a dozen, you called a couple and they were raving, well, there's a good chance that you might refer somebody to those people.

Sometimes, you really wonder. Do people really give a damn about being in business? Some really don't. And those are probably not the greatest people to do business with.

Eileen: And the other nice thing about it is, when you ask them for references of clients, they will give you a list and say, “You know what? I’m going to call this person to tell them to expect your call. I’m going to also tell them that they need to talk to you about XYZ.” So, sometimes that can lead to business connections.

So, I now have a lot of my clients just trained and conditioned to call us when they need things because we have connections to people who do a good job for them.

Robert: If you can’t help them, someone else can. So, you become a conduit for networking. And that all comes back to you in one way or another.

Eileen: I’m probably not as good as others are in beating up clients for referrals. I try not to beat my clients too hard. But, I’m very subtle about it. I have one client who is a CPA firm. I get five to ten clients a year from this one client. I don’t beat her up. I probably could get more out of her.

Robert: No. You want to reward her.

Eileen: I probably could get more out of her. But, I don’t hit. I also recognize that a lot of my clients may not travel in circles. But, I do always say to everyone I meet with, to clients when I call them to see how we are doing, “Hey, if you ever run into anyone who says they’re suffering from employee illness, don’t forget we’re here.”

Robert: Finding a phrase, one of my clients called it, “The phrase that pays”. It something that just sort of sticks in the mind. It’s something around a problem that’s often a little more memorable than the other way.

Eileen: I like to make people feel good who are referring people to me. So, I’m constantly thanking them. I have people who refer

people to me and they're so proud. I get them really proud about it. That gets the multiple referrals going.

I'm trying to think of anything else I do, and I don't honestly know.

Robert: Eileen, this has been great. These are just such useful ideas that everyone is going to get a great value from.

I want to thank you from the bottom of my heart for taking this hour out of your busy schedule, and again, thank you, thank you, thank you.

For more Information on Eileen Levitt and the HR Team, go to:

<http://www.thehrteam.com>