May you live in interesting times. ~ *Chinese curse*

In every crisis, there's opportunity. ~ *Chinese proverb*

How to Market Your Firm in a Time of Crisis . . . Without Shame

Right now, as you try to find your footing in the time of the Covid-19 crisis, you may consider marketing and sales to be insensitive or distasteful—but it doesn't have to be.

It's vital that you shore up your business—now—before your competitors do a better job of it. This is a justifiable time to protect your client relationships and to position yourself in the market without feeling guilt or shame. To actively do so isn't opportunistic—it's simply good client service and good business.

On the other hand, hoarding 17,000 bottles of hand sanitizer and trying to gouge consumers is shameful **and** criminal.

Marketing during a crisis is about maintaining and deepening relationships with clients. Yet that effort requires a delicate touch.

Right now, many of us may feel like we're in survival mode, but there's no reason to feel guilty about that. Our most basic instinct is that of survival. However, we need to be aware that our basic survival instinct is kicking in and how that might affect our mindset and, therefore, our behavior. It's important for us to not become too aggressive in marketing—we'll risk alienating clients. That said, we can't completely shut down, either. We must find the right balance.

Here's one answer to this problem:

The key to marketing without shame is just to be a good consultant, that is, to demonstrate your 1) empathy, and 2) authority.

It's an excellent time for the right sort of marketing

As a result of canceled conferences and meetings, less time in the car, and the efficiencies of working remotely, your professionals will soon have time for marketing activities that often fall by the wayside. Therefore, now is the time to get ahead of your competitors.

What follows are specific suggestions for how to market your firm, confidently and **without shame**, simply by demonstrating empathy and authority.

Do This

The next week or so should be all about empathy.

Day 1: Tell them you care

The first step, if you haven't already taken it, is to take to the phones and let people know you're thinking of them. Don't rely on email. This is the time for a personal touch that email can't provide.

You may feel unsettled about calling your existing clients, worried that you'll bother them as they scramble to figure out how to conduct business safely. At the same time, they're figuring out what to do with homebound children or how to protect aging parents, or both. Just as you are doing for your family.

Beyond worrying that you may be interrupting someone's day, there's the dread you may feel that your client will sense that you're merely trying to sell them something. Or that they'll think that you're only worried that your projects may be cancelled or delayed. In other words, that you're calling them merely out of self-interest. You should not let those feelings get in the way, so here's what you can do.

Have a servant mindset

Make sure that people have the right mindset about the call. **This is not a sales call.** This is about serving. You don't want to come across like Jerry Maguire, who, after being fired from his job as a sports agent, found himself phoning client after client, desperately seeking to retain their business.

Unless there's a compelling reason to do so, don't ask about the status of pending projects, only ones you're currently working on.

Whom to involve

Most firms will only ask their principals and project managers to call their counterparts, yet it's a mistake to stop there. Your technical experts should also call their counterparts. This is known as the "zipper" approach to client relationships, where there are interlocking counterparts all up and down the client organization.

What to say

Here's a suggested flow for the conversation:

1. "Hi Pat, I want to **briefly** check in with you to hear how you're doing and what you're doing to stay safe, to tell you what we're doing to protect our people, projects, and clients, and to see if there's anything I can do to help you."
2. Ask, "How are you doing and what are you doing to be safe and keep your people safe?" Now, shut up and listen.
3. Ask, "Other than safety, what's your biggest worry right now?" Shut up and listen.
4. Ask, "What can I do to help you?"
5. Explain your remote work plan so they understand what you're doing to keep your people safe and to ensure the success of your projects.
6. Ask, "What's the best way to stay in touch—is it okay to text you? Under what circumstances and how often do you want to hear from me? Should snail mail go to your office or home?"
7. Give them your contact info and schedule.
8. If you get their voicemail**,** be sure to leave a message. Because many people will be telecommuting, use their cell phones if it is customary for you to communicate with them that way. When in doubt, ask for their preference.
9. Document the conversation.

As you conduct this call campaign, share the outcomes with your close colleagues. Meet at least twice a week to discuss client status, concerns, and needs. During each meeting, brainstorm new ways to help clients.

Within Two Weeks

During the next two weeks, you'll want to proactively monitor news of your clients, continue to phone them, and begin planning and preparing for your mid-range marketing activities, especially those that demonstrate your authority.

Monitor client news online

For each essential client, have someone set a **Google Alert** for real-time updates about the client coming over the wire. The designated "monitor" should skim everything that comes across the wire. Give this task to a junior staff member to protect the time of your seller-doers and to help your junior professionals learn about your clients' businesses. If something arises for which you may be able to help them in some way, call and offer.

Client contact, cont'd

If you've been communicating with your clients exclusively by text and email about active projects, now is the time to pick up the phone. At minimum, call weekly unless they ask you call less frequently.

Plan

This is the time to get ahead of your competitors. Here's how.

1. **Prioritize**. Focus on profitable clients for whom you are one of their go-to consultants. Now is not the best time for first outreach to new prospects. That will come later.
2. Painstakingly manage your **opportunity pipeline**. You can't manage what you can't see, so your opportunity pipeline should be thorough and accurate, regardless of whether it's in a CRM or in a spreadsheet. The most essential fields on a project opportunity record are the Next Action, Date Due, and Responsibility. If kept current weekly, this will not be time consuming.
3. **No-go bad pursuits**. Have you ever had your car's fuel light come on but you're not sure you'll make it to the next gas station? Did you speed up to get there quicker, even though you knew that you were using more gas? By going slower, you conserve fuel and improve your odds of making that next exit. Logically, you know that, but it's hard to fight your urge to speed up. Similarly, it takes discipline to avoid acting on unhelpful marketing impulses. Instinctively, you may want to submit proposals on every project you're qualified to do; however, your time will be better spent on higher probability pursuits. Be disciplined.
4. Create **content marketing plans.** Content marketing is the business term for publishing useful information for your clients and prospects. Content marketing demonstrates your authority while being helpful—it's marketing without marketing. Create a "publishing schedule" for content that can be adapted for multiple delivery channels such as LinkedIn, industry publications, or webinars. You might also create helpful tip sheets like the one you're reading. Keep them short or at least make them interesting and easy to read.

Communicate effectively via the Web

Now is the time to get into the 2020s by being able to collaborate remotely. Here are some tips.

1. Be easy to reach. Get each employee to use your corporate standard **email signature,** including their cell phone numbers, social

media links, and videoconferencing links, for example, their Skype names. So clients don't have to dig around to find your contact info, append your signature to email replies and forwards, not just newly composed emails. Make your company and key contact information prominent on your website and on social media. You may have omitted it in the past due to concerns about headhunters or marketers, but now is the time to publish useful personal contact information.

2. **LinkedIn**. Get all employee LinkedIn profiles up to date, especially their profile summaries. Connect to all your best clients and partners. Start sharing helpful content posted by others or via a direct link to an article. When you share it but didn't write it, it's called "content curation." Curation is the fastest, easiest way to add value to your online network.
3. Relentlessly use **videoconferencing**. Each employee should be able to use several video conferencing services (e.g., GoToMeeting, Zoom, WebEx, Skype, Microsoft Teams). You may use some of these with limitations for free, so don't waste money. Make sure everyone has the proper equipment. Rent or buy laptops with cameras, if possible. It's not just about the video camera—be sure that people have good microphones or headsets. Most web conferencing services have phone apps, so you don't have to be in front of your computer to use them, or if you don't have the equipment at home. Make videoconferencing a habit. For **every** internal meeting or phone call expected to last more than a few minutes, use videoconferencing. When you're able to videoconference flawlessly, rope your clients into doing the same so you can sustain a human connection with them.

Within 30 Days

Continue to phone your best clients, but now also call people in your broader network. Don't merely check in—get their insights into what's going on with the new normal and their industry. Be prepared to offer your own helpful ideas.

Write content

This is where demonstrating authority comes in. Furiously write valuable content for your clients and partners. Focus your content on helping people do things better, faster, cheaper, and with less aggravation.

Have your experts deliver one session internally and record it and get it transcribed. The online services TEMI and Rev.com are excellent for about ten cents per minute. Consider recording an MP3 by reading the written article, so your audience can listen to it in the car or while exercising.

In 60-90 Days

In addition to habitual client contact and content marketing, your focus over the next months should be to close on immediate opportunities.

Close on your immediate opportunities

Your clients may have postponed some consultant selections due to uncertainty or inability to get selection committees together. You should use that extra time to create proposals superior to anything you've done before. Don't rush your proposals, be painstaking with them.

No-go bad pursuits and spend more time on good ones. Submit two superior proposals rather than three good ones. Hire a proposal consultant to help—they'll pay for themselves if you can improve your win rate.

I wrote the book *Win More Work: How to Write Winning A/E/C Proposals* and, for a short time, I'll offer to assess one of your proposals for free, so you know where you can improve. Call me at (859) 321-7547 to set up your free proposal evaluation.

Get your CRM up to date

Now is a good time to archive old records and purge bad ones. More importantly, for major accounts, make sure that client notes are available to everyone on your team. Scan your notes from your client conversations and attach them to accounts or contacts in your CRM or in a shared folder. Because this effort will be clerical in nature and time consuming, make sure your billable professionals have enough administrative support.

Publish your content

At this point, clients and others in your network may have reached the new normal and will be looking for a competitive edge. They're more likely to read useful content, therefore it's time to release your expertise into the world. Use your marketing team to help publish the content in print, via email, or on the internet.

Repurpose that content for a public webinar using WebEx or GoToWebinar—get your marketing staff to help organize and promote it.

Outlearn your competitors

The only source of sustainable competitive advantage is to learn faster than your competitors. Your best business strategy right now is to outsell your competitors. **Outlearn and outsell.** Business development is one skill that will pay off right away. Now is the perfect time to invest in developing the marketing and sales skills of your technical professionals, to make them productive seller-doers.

Broad marketing efforts will not achieve comparable ROI to that of the business development efforts of your seller-doers. However, in a time of crisis they can't sell too aggressively—they need skill and finesse. Therefore, consider investing in seller-doer training for your project managers.

I built the Seller-Doer Academy program to be delivered exclusively online via webinar, thereby eliminating travel time and expense. Call me at (859) 321-7547 to learn more.

Don't Do This

Stop investing in low value marketing activities. Low-value activities include traditional marketing activities focused on promotion and not on adding immediate client value. Marketing "noise" may lead clients to become annoyed with you or tune you out. If they tune you out, they'll miss out on reading the truly valuable information that you publish.

If your content does not educate your clients in some way, don't publish it without a compelling reason that clearly benefits your clients, prospects, or broader network.

Now is not the time to externally distribute company newsletters. Your marketing staff may suggest inundating the virtual airwaves with news release type information. I may be wrong, but I disagree. I suggest that you stop shamelessly promoting and instead focus on adding value through content marketing.

Other examples of wasteful expenses to slash include these:

- Rebranding. Often a waste of money even in the best of times.
- Rebuilding your website. Instead, ensure that key employees have a biography **with their direct contact information**. Add new project descriptions but make them short and useful to the reader.
- Shameless self-promotion on social media. For example: stop posting congratulations to your employees on their work anniversaries. Focus on delivering content of value and limiting noise.

Parting Thoughts

Let me quickly summarize the most helpful ideas in this article:

1. There's no shame in marketing if you market with finesse. Do that by demonstrating your 1) empathy and 2) authority.
2. With a servant mindset, pick up the phone and call your clients to see how they are faring, to share what you're doing to make projects successful, and to ask them how you can help. Call regularly.
3. Document and share that information internally.
4. Get proficient with videoconferencing and make it a habit.
5. Plan, prioritize, and insist on go/no-go discipline.
6. Close on immediate opportunities—write superior proposals, not good ones. Consider hiring a proposal consultant to help.
7. Start or accelerate your content marketing to help your clients work better, faster, and cheaper.
8. Stop spending money on marketing that isn't helpful to clients.
9. Outlearn your competitors. Invest in training your seller-doers. Find courses built for online delivery.

There's no shame in trying to protect your business during this time of crisis, but it's important to do it in the right manner—by being empathetic and by sharing expertise that can help your clients succeed. If you take these steps now, you'll not merely survive, you'll guarantee the foundations for a stronger business for the coming year and beyond.

Finally, take care of yourself, your families, and your employees. And keep reminding yourself that this will not last forever.

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