



The Chartered  
Institute of Marketing

PROFESSIONAL

# Marketing Professional Services

Winning New Business in the  
Professional Services Sector

MICHAEL ROE



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# Marketing Professional Services



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sector

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**Michael M. Roe**

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# To the prospective reader

Hello, my name is Michael Roe, and I've written the book you are holding which is called *Marketing Professional Services*. Had you heard of it before you picked it up just now?

'...'

Well, that's interesting. You see, the book was designed exactly for people like you, who are offering professional services to their clients, in order to give them a clear and simple framework on which to build a cold canvassing and marketing campaign. I think this would be of tremendous value to you and your organization – and that's why I would like to invite you to browse through the chapter headings in the contents to see what benefits the book can offer you. Would you be free to do this now or would you rather wait till later?

'...'

Yes, you're right, there are a lot of books on the shelf around you with apparently similar titles, but what I think you'll find with mine is that it is the only one written by, and focused on, the needs of a professional services provider, and that's why I'd like you to look further into my book – can you do this now or would you rather do it another time?

'...'

It may indeed seem a lot of money for this book, but I'm sure you'll agree that, when set against the potential millions of pounds of new business out there to

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be won, it is excellent value, so would you like to look further now or a little later?

'...'

Of course, you're busy right now; I think people are always short of time nowadays, but that's why I just suggested you first browse through it, either now or some time soon – which would you prefer?

'...'

Excellent, I'm glad I've persuaded you to have a quick look now. I'm sure you could be equally persuasive on behalf of your own professional service with my help, and would find my book both intellectually and financially rewarding. So let's get started ...

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# Acknowledgements

While the initiative, execution and practical experience were mine, the opportunity to learn new business winning skills, to apply them, and then to pass on my knowledge, derive from many helping hands. I acknowledge them all below with immeasurable thanks:

Victor Lewis, MD of World Trade Publications, for introducing me to the world of telesales, to MBA Training, and for constant advice and guidance

Barry Marcus, co-founder of MBA, whose original training course on prospection formed the foundation of my skill base

Research International, my employer, for allowing me the opportunity to apply my ideas and expound them openly in this book

My seminar partners who have allowed me to quote them liberally here, namely Simon Rhind-Tutt, who linked it all together for us using his all-round marketing skills; to Claire Spencer, our PR specialist; to Tom Rayfield, our man in the Agency (and humorist); and to Bill Pegram of PWA.

My family and mother for their love and support.

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# Introduction

This book comes as a surprise out of another surprise. The author was working for many years as a professional in a services sector then seen as being somewhat academic in mentality and lacking aggression in sales. To be concrete, I was (and remain) a senior market research director who had worked for a considerable time serving marketing clients from my position in a major international research agency. Life had been comfortable, only mildly disturbed by thoughts that maybe more could be done to energize my particular business, and the sector in general.

Awoken by a take-over resulting in a more financially demanding owner, I took the initiative to become better acquainted with a new environment, that of sales and selling. What I found was not only the brash world of salesmanship, but also the subtle, challenging and effective skills of prospection and cold canvassing. These latter techniques seemed surprisingly suitable for transfer into my sector. I asked for and was given the opportunity to apply them. Another surprise – they worked ! And as I became more involved in the selling of my own professional service I realized that we were not even applying the skills of marketing that were the very *raison d'être* of our major clients. Others I met in similar professions were making the same sort of discoveries about the lack of marketing and sales activity in their fields, whether these were consultancy, accountancy, advertising, design, PR or other comparable professional service sectors.

A few years went by and my own new business success rate continued to build, resulting from a mix of cold canvass sales in particular – hundreds of presentations to prospects leading to millions of pounds worth of new business – and marketing activities in general – which won an award from the Institute of Sales Promotion. It seemed a natural development to tell the uninitiated about it – in my own organization and outside (spurred, I am sure, by a mixture of pride, enthusiasm and egotism).

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I linked up with a few like-minded converts. They were specialists in their own fields of marketing, advertising, direct marketing, and PR, and their contributions are recognized in this book at each of the relevant chapter headings. We ran seminars entitled 'Winning New Business' sponsored by Marketing Week magazine . . . and people came ! Professionals like ourselves. Professionals who wanted to win new business, and who wanted to do so by applying skill and judgement, rather than just enthusiasm and luck.

Furthermore, they told us afterwards that they felt they had learnt something valuable and were really grateful to myself and my team. Not from our crude 'close that sale!' or 'do you seriously want to become rich!' exhortations – those were not our messages. But from material we had designed for their own special circumstances. So this book, never intended at the outset, was the next surprising, but logical, development.

What I can offer you, the reader, comes mainly from my own practical experience, enlarged through my contacts with those who joined me in the seminars and by some additional reading. It is a practical 'How to . . .' book, designed for your use and not as a contribution to academia.

Its applicability should extend beyond the UK; I have lectured across Europe without meeting strong 'it'll never work here' resistance. My audiences in the UK have also included some from outside Europe. And common sense dictates that the principles will apply well in North America, the home of salesmanship.

I make no excuses for the constant references and examples from my own experiences within the profession of market research. That's where I tested the theories of winning new business and found that they produced results. So that's where my examples come from – it's what I know best. Just replace the words 'market research' in my sales pitch with your own offer when you read my cases and samplers and it should work fine.

The more I read, the more I realized that most service professionals are alike in relation to the subject of winning new business. You may not be a market researcher or work in marketing services; you may be a consultant, a lawyer, an architect or an accountant. Whatever. We all have intangible services to offer to other professionals. These intangibles are information and knowledge. Too often they remain hidden assets. This must be changed – we must make our target audience aware of our knowledge base so that our new business 'suspects' can move across the boundary to become 'prospects' and then clients. Competition is increasing its clamour for attention, whilst concurrently there is a general feeling among clients that differentiation is lacking between the offers made to them. At the same time our colleagues, fellow professionals, are not as (new) business aware as they should be. So we ourselves must be more active.

There are three ways to lose business – you can lose an existing client; you can have your proposal rejected; you can fail to be invited to tender. For me, the latter is the worst crime, because you have not even got to stage one. This book is about avoiding such a situation.

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So much is out there to be gained by learning how to make your presence known to potential clients personally, frequently and professionally using some simple skills in preparation, prospection and presentation; and to build this all around a well thought through marketing plan. That's where my advice can help you. Some adjustment to your own particular circumstances may be necessary. But keep the basic principles in mind, then adapt and apply to market your professional service and win new business.

Good luck!

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# How to use this book

The most important single method of developing a practice is through personal contact. It has clear advantages – total flexibility, comprehensive, attention getting'

A. Wilson (1994), *Emancipating the Professions*, Wiley

Agreed! But how to do it? Seminars were my first means of communicating to a wider audience my practical experience of cold canvass selling my own professional service. My multi-disciplinary group of colleagues and I made up a lecturing team of five, and we constructed a day-long programme covering most of the features listed in the chapter headings preceding. We each focused on our own specialism and attempted to generalize from our specific personal experiences so as to be relevant to the broad professional services sector audiences that we faced. Our aim was to provide a full overview of the subjects of selling and marketing professional services such that delegates would feel that they had received a practical and complete training which they could start to put into operation very quickly.

The day began with an explanation of the logic of the programme, as now described in Chapter 4, which we then followed broadly in the order reproduced in this book. It seemed to work well, the delegates departing full of praise for both the structure and content, and keen to put our theory into practice for themselves. Therefore, it should be perfectly possible for you too to read the book from cover to cover and gain the same benefits as the seminar delegates. The style I have chosen is conversational, based on the lectures, so if you are here for 'the full monty', please feel free to study all the techniques presented from start to finish.

At the other extreme, my own bias and 'specialism' is undoubtedly linked to personal contact, the skills and benefits of prospection and cold canvassing,

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and, if that is what particularly interests you, I am happy because I think I have something special to offer. In such circumstances, you may wish to dip in at Chapter 5, which represents the heart of the book, and move on from there as your interests take you. Chapter 5 comprises the theory and practice of prospection skills, also providing operational hints and tips and many sample exchanges between service provider and prospect. (The latter replace the real exercises I conducted with the audience using two phones in the lecture room.) After reading the full chapter you can consider yourself equipped to start prospecting for your own organization immediately.

But nothing exists in total isolation, and it would perhaps be more logical for you to take three chapters together as a segment – numbers 4 through to 6 – which includes the key Chapter 5, but adds in the theoretical structure – in the preceding chapter – together with advice on how to cold canvass when you get to your appointment – in the following chapter. These three form a unit, focusing on my 3 'P's of:

**Preparation**  
**Prospection**  
**Presentation**

You will find multiple sample illustrations of real successful prospection calls and presentation meetings towards the end of each of Chapters 5 and 6, with a concentrated summary of the 3 'P's at the conclusion of Chapter 6. After these, you can explore the other chapters in any order. The choice is yours.

Whichever strategy you adopt, please bear in mind that Chapter 3 and the final chapter cover the broader theory and a practical example of putting that theory into action respectively, and so should not be missed.

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# Winning new business – your duty

### **The lion and the gazelle – a new business parable**

Every morning in Africa a gazelle wakes up.  
It knows it must run faster than the fastest lion or it will be killed.

Every morning in Africa a lion wakes up.  
It knows it must run faster than the slowest gazelle or it will starve to death.

So it doesn't matter whether you're a lion or a gazelle, in new business ...

**WHEN THE SUN COMES UP, YOU'D BETTER START RUNNING!**

Attributed to Sanders Consulting, 1992

It's a jungle out there! Working in professional services, you may see yourself as being above the life or death struggle of sales, being a 'purveyor' of professional expertise rather than a 'seller' of services ... but nothing could be further from the truth. Unless you win (read, sell) new business you will die like the gazelle or starve like the lion.

My book aims to provide you with life-preserving skills, hopefully life-enhancing ones too. It is based on the premise that new business is the life-blood of all commercial activity, no less so in professional services. And it stresses that the duty of getting this new business is yours. If your job

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description includes the words 'new business', 'business/practice development', or 'marketing', then there can be no doubt about the book's relevance to you. But whatever your job involves – fee earner/consultant/partner – you are billings and profit responsible and it is vital that you start now to commit to business generation. You and your firm's business life depend on it, so you cannot avoid your duty.

My aim is to help you generate lots of new business (as a solus activity or alongside servicing existing clients) . . . in other words, to sell successfully. But I am not a salesman myself. I am a professional servicing the marketing industry, like you the reader, I am a professional selling to other professionals. What I am is a professional who has been bitten by the new business bug and who determined some time ago to pursue my objective using a little less luck and rather more skill.

Professional skill. Because the objective is to add a third professional element into the equation: to *professionally* sell professional services to other professionals. The noun 'salesperson' doesn't sit comfortably in this context – but the verb 'sell' must never be avoided. No salesperson, however brilliant at his or her craft, could ever replace you in front of the client, because he or she would not possess the professional qualities that remain vital in the above situation, namely in-depth professional services training, skill, experience, and knowledge. You do not sell from a rate card. The client expects to talk to you as an equal in professional competence. In fact, the people to whom you're selling are so similar to you that in many cases the roles could be, or already have been, reversed. Sellers switch to being buyers and vice versa all the time.

You may not wish to be a salesperson, considering yourself a practitioner, but you should not be snobbish about the salesperson's skills. They are finely honed and you would be foolish to ignore them . . . just as you would be foolish not to apply them without some sensitivity as to the professional nature of your prospect (you are not a double-glazing salesperson) . . . just as you would expect to add them to other professional marketing skills, some of which may be your own basic stock in trade: advertising, PR, direct marketing, etc.

Those already in marketing are familiar with the fact that most of the classic mnemonics start with 'P'; the same applies to the winning of new business. In fact, there are three Ps here: prepare; prospect; present. By employing all the above-mentioned skills, this is what you should achieve – lead generation, appointment getting, and then arriving face to face with the prospective client. Not surprisingly therefore, the core Chapters 5 and 6 of this book focus on prospection and cold canvassing, the centre of the new business process.

Why should the face-to-face presentation be so vital? Well, what you are selling is an intangible, a service. And when it comes to selling intangible products, or indeed product intangibles, there is one guru. He is Ted Levitt of Harvard Business School from whom two quotes are relevant:

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‘the product will be judged in part by who offers it’

‘people use appearances to make judgements about realities’

*Harvard Business Review*, May–June 1981

What this makes clear is that **you** are the tangible representation of your service, the main judgement criterion. All the rest is trust – you are the reality on which the prospect will have to make his or her judgement. As well as representing your agency/consultancy/partnership, you also differentiate it – you are the most distinctive element, the unique feature. So, you must present yourself to the prospect along with your service.

Halting a moment on this issue of ‘trust’. A US consultancy, Syntectics Inc., has spent a considerable time determining what impacts on trust. In fact they have developed a formula for it:

$$TRUST = \frac{CREDIBILITY \times INTIMACY}{RISK}$$

It is the correlation between ‘intimacy’ and trust that is particularly relevant here. It confirms the need for the face-to-face interaction that forms the core of this book. ‘Credibility’ can be built through other marketing activities, ‘risk’ is related to the spend of the client and so usually out of your control (although the plus point for professional services is that often a low cost trial of your organization is possible before a major commitment is necessary.)

This book will, however, cover the full range of sales and marketing tools available to you. Their employment (or deployment) will be based on your own specific new business needs evaluation coupled with marketplace judgement. A full-time commitment is recommended (from its earliest days, the original Saatchi and Saatchi Advertising Agency had always used a dedicated team working on new business which did not divide its time with another job.)

Can you/your firm afford this? It may not always be possible, particularly in the case of a very small consultancy. But full time or part time one thing is clear – you will need to devote **quality** time to new business. Because always remember – investment will be rewarded. A skilled and effective prospector/cold canvasser should return gross margin equivalent to well over three times his or her total costs.

And enthusiasm. It is only through a combination of skill and commitment that you will be successful, only through this combination that you will overcome the basic fear of selling. Make no mistake – it is really fear that produces what masquerades as superiority over the lowly salesperson; fear of rejection, fear of failure, fear of raising your head over the parapet and shouting ‘buy me!’.

Philip Kleinman, reporting in *ADMAP* magazine on a meeting of the Association of British Market Research Companies (ABMRC), noted: