

The Opening Playbook

The Professional Guide to Building Business Relationships that Grow Revenue

Andrew Dietz
(Published by McGraw-Hill copyright 2014)

Summary by Bob Littell, Chief NetWeaver
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Testimonial

"I've read dozens of books before that cover all aspects of 'selling' including: prospecting, qualifying leads, networking, presenting, and closing. I never have read a book before that so simply and practically covers all of them in a way that anyone from a neophyte to journeyman sales professional can understand and immediately apply. Andrew cleverly utilizes sports analogies and playbooks to help drive key points home and show how any salesperson willing to study Andrew's playbook, can make the All Star team."

Bob Littell, Chief NetWeaver

Introduction – Win The Coin Toss

Andrew's **'counter-intuitive'** approach to selling is a breath of fresh air. Most of us in sales who grew up 'selling' in the '60's, '70's, and '80's were trained with a sales script and with heavy emphasis on **'closing'** right from the 'opening bell', and thus how to handle the **expected OBJECTIONS** which were bound to come up after we had unsuccessfully made our 'pitch'.

In Andrew's words:

*"Closing before you've appropriately opened a business relationship is the sound of a door shutting in your face... Here's the mantra for the 21st century: **"Always Be Opening."***

But there's a right way and a wrong way to 'open' a business relationship:

"Especially for professional services providers, opening a relationship the right way and keeping it open for the long run leads clients to step forward and to select you and your firm. . .and even to work with you again and again. Getting bought is better than selling. Also, the benefits of opening an authentic advisory relationship (a real relationship, not a manipulative one) accrue over time in a way the short-term transactional drive to close

deals never can.”

Throughout the book, Andrew draws analogies with various sports, primarily football and in that regard, he references the **‘red zone’**:

“Coaches, teams, and athletes rely on playbooks to define orchestrated plays, patterns, and progressions that increase the likelihood of scoring. . . In football, the more often a team can get the ball in the red zone, the area within 20 yards of the opponent’s goal line, the more likely it is to put points on the board. Football playbooks have frameworks for making that happen.”

Andrew equates the ‘red zone’ to *getting in the door using proper **‘technique’** and **‘finesse’***:

“Once most professionals get in the room with an ideal prospect who has a real and immediate need for help, those professionals usually can do a fine job of demonstrating their differences and winning work. . . The problem is that too many professionals don’t know how to get into the room in the first place.”

That’s really what this book is really all about. Andrew makes this critically important point that professional selling is all about, **“getting you and your prospective client on the same team as early as possible, long before you propose work or are officially hired.”**

He also makes it clear that:

“Your prospect or client is not the opponent. No, the opponent is whatever stands in the way of a prospect’s success and the view that anyone but you is capable of and devoted to obliterating the prospect’s obstacles.”

Andrew provides a formula for the ‘right way’ to Open:

Right Connections + Right Conversations + Right Context → OPENING

In the book, Andrew helps us learn the secrets for making this ‘sales transformation’ by putting ourselves in the shoes of **Sam Wentworth**, a six-year associate at a large law firm in a major city. He’s proven his technical skills but now, to make partner, he must now prove his **“business development ability”** if he’s to make partner.

The author provides numerous football analogies throughout the book such as *analyzing game film and stopping it at critical junctures to ‘help achieve optimal performance’*; the quarterback *‘calling audibles to modify his actions after reading a situation’*.

Andrew quotes Sun Tzu’s classic book, **“The Art of War”** – *“Tactics without strategy is the noise before defeat.”* So Andrew makes it clear that: *“Strategy is a well-informed plan of action, validated by experience, that increases the likelihood of business development success.”*

But Sun Tzu also said that *“Strategy without tactics is the slowest route to victory.”*

Andrew has worked with dozens of companies – big and small - in dozens of situations employing strategy and tactics: *“The Opening Playbook has been battle tested and found to produce significant relationship and revenue gains if it is diligently sustainably applied.”*

Andrew closes the introductory chapter by quoting Steve Ross, *the legendary shoot-from-the-hip CEO who transformed the parking garage and funeral home company Kinney National into the media giant Time Warner*. Ross attributed these words of wisdom to his father:

*“There are **three categories** of people in this world. The **first** is the individual who wakes up in the morning and goes into the office and proceeds to dream. The **second** is the individual who gets up in the morning, goes into the office, and proceeds to work 16 hours a day. The **third** is the individual who comes into the office, dreams for about an hour, and then proceeds to do something about his dreams.”*

So Andrew advises that if you want to get the maximum benefit from the approach he describes herein, that you need to adopt the 3rd approach:

“Figuring your Opening Strategy and planning actions linked to that strategy equate to your hour of dreaming, and this strategy is useful only if you use it to guide the rest of your working day. If your tactics and actions match and support your strategy, you are on the right growth path.”

Consistent with the book’s sports analogy approach - especially football, in each chapter, the author alternates a “Roll Game Film” heading; with the next chapter heading – “Coach’s Commentary”; This is an interesting way to watch how the characters in the story perform; then just like the team would do after the game, review what happened – what went right. . .what went wrong. . .and what could or should have been done differently.

Section One – OPENING PLAYS

Chapter One – DON’T FUMBLE THE KICKOFF

Roll Game Film

The story begins as Sam Wentworth is savoring his good fortune to have been singled out in his annual review as ‘partner material’ for Habersham & Smith, LLP, *a century-old firm with as much prestige and history as any in the city*. Now the ball was in his court to prove that he had what it takes to “*bring in the work necessary to keep that prestige alive.*”

But, Sam wasn’t being asked to do it alone because the firm’s senior partner, **Roger Smith**, whose grandfather founded the firm, *had taken Sam under his wing*.

To say that Roger was **old school** is an understatement. From his huge Rolodex – a real one – to his motto that “**No** is not an option. . .He approached every conversation like the litigator he was, like a closing argument, like a sale he hadn’t made yet.” According to Roger, “You need to be a closer”.

So today, Roger had set up a meeting for Sam to meet with a 'prospective client' – **Joseph Jordan** – the General Counsel with the fastest growing technology company in the region – **Specific Engines**. Roger and Jordan go way back. He filled Sam in on some of his personal info – *wife of 15 years, two kids, Ohio State grad, and to top it off, a friendly fellow all the way around.*

Roger believes that Strategic Engines *could use a little help negotiating its employment contracts as it expanded.* What a perfect setup for Sam. It would be a 'cake walk' to close his first deal. ". . .*it would be partnership, dead ahead*". . .NOT SO FAST!

With the setup practically assuring success, Sam "*believed he didn't need to spend a whole lot of time preparing for a client meeting.*" He had the look of success: "*Every hair in place, suit crisp even after the rain, teeth gleaming, Sam wasn't knockout handsome, but he had the look of a best friend from college, a familiar haven't –I-met-you-before appearance.*"

As he prepared for battle, Roger's motto was ringing in his ears: "***No is not an option.***"

After the customary 'firm handshake' exchange, Jordan opens the conversation with a friendly overture, asking how his old friend Roger is. First fumble by Sam:

"He's doing very well. Very busy. As a matter of fact, that's why he sent me to you. He believes that I could do a fine job of representing your business in some of your. . ."

Jordan interrupts:

"Whoa, whoa, slow down there, Sam. We'll get to that."

What followed was the beginning of what could have been a 'short' friendly conversation about James Bond movies. Unfortunately Sam carries this discussion way too far – getting into 'Bond minutiae', and after recognizing Roger is shifting in his chair and that the control is slipping away, Sam says, "*We can talk about this the next time we get together. . .I'm sure you're very busy.*" Too little. . .too late.

Jordan surprises Sam by asking him to summarize his own life history, but as Sam responds to Jordan's curiosity about Sam's family status, and after admitting he's still single, Sam trips up when he mistakenly refers to Jordan's **TWO** children: ". . .*Still not married either. I'm sure your two keep you very busy.*"

Whoops! Turns out Roger's info about Jordan was outdated and now there are THREE children: "*He [Jordan] smiled again, but this time it lacked warmth. Three, Sam. I have three kids.*"

They get back on topic although there's a little bit of an uncomfortable silence as Jordan flips through the detailed portfolio that Sam had prepared. As he closes the portfolio up, Jordan states:

"This is wonderful and I'm very glad you brought it," . . ."but I'm not exactly in the market for new outside counsel. We're doing just fine on our own with our in-house team."

Ringling in Sam's ears is Roger's motto: "***No is not an option.***"

After Sam's several additional attempts to answer objections, Jordan's mood changes as he realizes that Sam just doesn't seem to understand that he's blown it. When Jordan finally sees that no matter what he says, including restating that he's chosen to only rely on inside counsel, "*Jordan smiled and looked out the window at the rain. Then he stood, put Sam's folder on his desk, and extended his hand. 'It was a pleasure to meet you, Sam. Please give my best to Roger, all right?'*"

So we think that Sam finally gets it, but even the reader is uncomfortable when Sam gives it one last parting shot:

"Sir, I'd really like the opportunity to work with you and your colleagues, I really think we have something to offer your organization, and I feel like I didn't get that across here."

Jordan to Sam:

"It's been my experience that I almost never have to use the word no, because most people know when a conversation is headed that way already. You already know, Sam, but just so there's no doubt, NO!"

That was accompanied with a genial slap on the back slightly directed toward the door.

Seeking some solitude as Sam dejectedly vacated Specific Engines' building, he spotted a warm light emanating from what looked like a coffee shop down the street. It's the "**Open Note**". . . "*where he could see people sipping at coffee cups but also working away in a quiet, calm setting.*" . . . "*Sam didn't know if it had decent food or coffee, and at this point he didn't care. If they were functioning in this economy, they were doing something right, something better than what he was doing.*"

Chapter Two – ESTABLISH FIELD POSITION

Coach's Commentary

Coach Dietz recommends that, "*The idea of an initial prospect conversation isn't to win the business on the spot; it's to engage in a conversation that establishes your right to talk further and explore ways to provide support to the prospect.*"

"Sam was intent on closing a deal in the first meeting despite never having earned the right to do so. Sam went on the offensive way too early, and as a result, he was, well, offensive." . . . "**In football terms, instead of trying to fling a Hail Mary on the first play, Sam would have done better to find his comfort zone and figure out a strategy to work his way down the field. You've got to be in the game and on the field before you can score.**"

Coach Dietz's advice:

"What if instead of closing a deal, Sam's intention for his first meeting with Jordan had been simply to begin what might well become a long-term personal and professional relationship rather than a transaction to be closed ASAP." . . .

"What if he had said something along the lines of: 'Mr. Jordan, my goal for our meeting today is simply to introduce myself and to begin a dialogue. You don't know me yet, and I haven't earned the right to expect anything more. I don't come empty-handed. I can share

my observations and hypotheses about how your competitors are handling certain litigious situations and what they might mean for Specific Engines. And I would welcome hearing how you perceive the same situations and what else may be a priority for your team. That way, I can keep my eyes and ears open for ways to be supportive going forward."

Andrew also explores the meaning of "**opening**". As a verb, he quotes it as, "to open up and talk freely – to reveal oneself in an increasingly straightforward and uninhibited way." And as Andrew wisely observed, "if Sam had embraced this version of opening, he would have worried less about being perceived as a peer to Roger and Jordan and been more genuine and approachable. What if Sam had said something that acknowledged his vulnerability and the imbalance of experience, knowledge, and power in the room?"

Here's a terrific 'opening' Coach Dietz provides that any YOUNGER salesperson could use in some modified form when first approaching someone years older, and probably wiser through the school of 'hard knocks':

"Mr. Jordan, I can't hide the fact that I'm still early in my career, I think that's why Roger asked me to visit with you in particular. He knows your reputation for taking chances on smart young talent with an entrepreneurial work ethic and lots of curiosity. The truth is, you get a lot for your money that way: letting a partner-track associate serve you. He knows too, that I would gain as much as I give in supporting your efforts because of your expertise not just as a savvy client but also as a skillful coach. But again that's just my guess. My expectation today is just to open what I hope will be long-term business friendship. Does that align with what you were expecting, or was there something else you wanted to make sure we cover?"

And as Andrew suggests wouldn't this have been a better segue from their James Bond discussion. . .to business:

"Well, now you know something about my cinematic interests and experience. Would it be helpful if I told you something about my professional experience? Who Knows, maybe we'll find more common ground."

Andrew offers several other definitions of the word "**opening**" in light of what should be the goal of an '**opening**' dialogue: "the process of clarifying, unfolding, broadening, revealing, making more responsive, and understanding"

And when you have '**earned**' the right to move the conversation to more of a '**closing**' one, Andrew suggests something along these lines: "How would you like to proceed? May I draft a proposal describing how my firm and I will approach this challenge and support your efforts?" But as Coach Dietz adds, ". . .the time to close is rarely, if ever, during the first meeting."

So what could or should have Sam done differently? Andrew reasons that rather than trying to '**close**' on the first meeting, he should have gotten a sense of WHO Jordan was so that he could start to understand what he could have done for him and for his company:

"What did Sam know about Jordan's position and career goals and aspirations and how he and his team would be evaluated this year? What did Sam know about Specific Engines' marketplace, its top strategic initiatives, its biggest threats and opportunities? Virtually nothing, and it showed."

Perhaps the primary lesson and theme from these first two chapters is that: “Leaving room for only one good outcome to a business development encounter introduces undue stress into the situation.”.

“No is not an option” which is was Roger’s mantra. , ,

, “. . . is an absurdly limited idea. It produces a binary situation – you get either a yes or a no outcome. Instead what you want is a possibility-filled outcome that leads to another opportunity to build your value and trust in the mind of the prospect. Before your next critical business development meeting, brainstorm a range of possible positive options and outcomes besides yes or no.. . One of the most important questions to ask yourself is “How else?” to win?

Read page18 to see more specific questions Andrew suggests to expand this question.

Chapter Three – NAIL THE OPENING SERIES

Roll Game Film

Licking his wounds from his debilitating encounter with Jordan, Sam enters “The Open Note” to an ambiance that certainly helped: *“the warmth of a fireplace encircled by a wrought-iron grate and surrounded by thick leather chairs and couches”. . .”so many windows in a coffee joint before – enormous and warehouse loft style.”*

Then add the *“delightful aroma”* from *“warm chocolate chip cookies, the milk chocolate still soft in the dough”*. . .and you have a clue why the owner of this establishment is going to help Sam realize what creating value is all about.

As a young woman – about his same age - comes up to him holding- the plate of cookies, rather than asking what he wants to order, her OPENING is, *“You look like you could use one of these.”*

Assuming they are ‘for sale’, Sam asks, **“How much?”** as he adds that these are sold for \$3 a piece down the street, **“Candace”** not only responds **“No Charge!”** but as you might have guessed, she owns the place, but not just this place – 7 locations in seven different states.

After offering to pay for his ‘black coffee’, Candace holds up her hand: *“Pay me when you’re ready to leave.”. . .”You look like you could use a few minutes to relax”.*

I’m sure you recognize already some of the differences in Candace’s approach versus than what Sam did.

As he had walked in, Sam had also noticed a piece of art of the wall of a ‘boat’ and as he was leaving, Candace noticed him eyeing it again and said: *“You like that piece don’t you!“. . .”I understand. There’s nothing more inspiring than an authentic expression of raw creativity.”* Interpreting this as the beginning of a sales pitch to buy it, something that had no ‘immediate benefit’, he reacted a little defensively. But the pitch never came. More on the painting later.

Chapter Four – ESTABLISH QUARTERBACK–RECEIVER RHYTHM

Coach's Commentary

Coach Dietz poses an interesting 'football' question:

"Who matters more in connecting for a successful pass, the quarterback or the receiver? It doesn't matter. They aren't competitors; they're teammates. What matters is that the quarterback and the receiver have built a trusting relationship over time and have established a rhythm of working together on the field."

In fact, Candace.

". . . doesn't perceive Sam as a customer as much as she sees him as guest in her home and a potential friend. And she definitely doesn't treat Sam like a competitor, someone she has to outflank, subdue, capture, and trick into doing something he doesn't really want to do. Her first focus and intention was to understand what Sam was all about and to learn what stood in the way of his happiness."

What a refreshing way to look at a 'salesperson' to 'prospective customer/client' relationship: "Candace knows that someone has to feel comfortable before opening up and that the best way to facilitate that is to create an open environment and be open yourself first."

Andrew closes this chapter with four attributes of what any **first-encounter** ought to include in the way of behavior:

Findable – not just location like the warm light, big open windows of the coffee shop, but "making it easy for the right prospective clients to find you."

Friendly – Words like "warmth" and "empathy" are the coach's word tips, plus: "Friendly is the right attitude to begin a new connection. Friendly is an attitude of feeling first and facts next." And he adds a warning about 'friendly': "Fake friendly is readily transparent and makes you suspect. Friendly for real, as in authentically curious about others, makes you likable."

Free – As the coach reminds us: "You've got to give to get, says the common pay-it-forward wisdom." . . ."Demonstrate immediately that you are bringing something of value to the other person. It doesn't have to be grand; it does have to be freely given."

Forward – Finally, coach reminds us that the quarterback (the salesperson) and the receiver (the prospective client) need some quality time together to build trust: "That doesn't happen in the first practice or the first game but through consistent, continuous interaction over time, getting better as each encounter occurs and progresses." He says you should simply behave in a way to make sure there IS a 'next encounter'.

Chapter Five – DEVELOP POCKET PRESENCE

Roll Game Film

At first I didn't quite understand the meaning of the chapter title and how 'pocket presence' fit in, that was until we got to the part where it's revealed that Sam had been quarterback in high school. Being '**pummeled to the ground**' as the '**pocket**' broke down, reminded him of what just happened when he totally blew his second chance at redemption with Roger. Roger had shown displeasure as he learned – by phone, not in-person - what had happened with Sam and Jordan – Sam's first 'sales prospect' **referral** from Roger, who didn't want to know the details – only did he land him, or didn't he?

But having the kind of sales attitude that 'it's just a numbers game', Roger throws Sam another bone in the form of a second target prospect – "**Alex Itzikoff**" – Universal Airlines.

So has Sam learned anything yet from his first encounter with Candace and her advice that the primary goal of the first encounter, is to make sure that there is a second encounter, by first establishing a relationship and hopefully by bringing **something of 'value'** to the table?

Nope. And this time instead of his previous guffaw - not knowing the correct number of Jordan's children, Sam again fails to double-check Roger's real knowledge of "Alex Itzikoff", who turns out to be the wrong gender:

"Hello, this is Sam Wentworth with Habersham & Smith. I'm calling on Alex Itzikoff on the recommendation of my colleague Roger Smith".

Response by Alex's admin: *"And this is regarding. . .?"*

"I'd like the opportunity to talk to Mr. Itzikoff about opportunity to provide counsel. . ."

Response by Alex's admin: *"There is no Mr. Itzikoff. There is, however, a Ms. Itzikoff"*

So Sam is '**sacked**' once again, his '**pocket**' broke down largely because he didn't have the **pocket presence** to do his research up front.

So after Candace listens to the story of his 2nd failed attempt, she decides to step in and to **make** Sam listen this time. As she '*bows deeply*': *"You are about to get my Jedi training, young Sam". "And the secret is. . ."* as Sam writes down, "**THE TRICK IS**". . .Candace corrects him:

". . .there is no trick. Or at least no trickery or deception." . . .

"No secrets or trickery will get a genuine relationship started. You've got to remember what regular human-to-human behavior is like. Not salesperson-to-sucker manipulation."

"If you're going to interest someone in what you have to offer, it has to be the right kind

of interest, the right kind of conversation. Not to mention that it needs to be the right kind of person or you're wasting your time completely."

Coach Dietz closed out this chapter with one of the key points from the entire book. It's very simple and it just means that successful selling involves:

"right conversations. . . right people. . .right times. . .in the right way."

But Candace cautions Sam: ***". . .because something seems simple doesn't mean it's easy."*** She reminds him *how learning to drive a car* seems so simple now that it's just second nature. Not always so.

That reminded me of learning to drive my first car - a '49 Ford with a manual stick transmission and a 'clutch'. My first accident was caused by simply not paying attention to the little old lady in front of me as we were both on the entrance ramp to a highway. Assuming that because the highway lane was now clear, she would have gone forward, I failed to double check that she actually had done so. Wrong! Luckily no damage to her car and no injury to either of us, but some fairly significant damage to the front end of mine. Ever since, I triple-check that the car in front of me has actually moved ahead.

Does learning how to drive a car bring back any bad or funny memories on your part?

The chapter concludes with Sam's curiosity about what actually exists behind the door and beyond the tinted glass there in the coffee shop:

Candace: *"That's The Open Note's coworking space." . . . "It's a shared working environment for people who think for a living, you know, people like you and other professionals and entrepreneurs and creative types. They want to have a place besides an office or a coffee shop to work and share ideas."*

More on this later.

Chapter Six – THE RIGHT PLAY AT THE RIGHT TIME

Coach's Commentary

Coach Dietz begins the chapter by examining the word 'right' and the fact that in opening business relationships, it can have many different meanings, ***". . . to have the right conversations at the right times with the right people in the right contexts."***

According to Andrew, "right" can have a number of different meanings:

- **"correct"** (as in *"the right contact"*)
- **"brought into balance"** (as in *"to right a ship"*)
- **"appropriate for the situation"** (*"he said the right thing"*)
- **"a privilege"** (as in *"he earned the right to meet with the CEO"*)

So here Coach gives us the “Ideal Order of Operations” for opening business prospect relationships:

1. **Establish and articulate your claim to fame**
 - “Who are you? What is it you do better than anyone else? Why should anyone care? Who – especially – should care about your unique genius?”
2. **Develop a prioritized prospect wish list**
 - “Who (organizations and referral sources) will be most likely to be attracted by your positioning- not just as a client, but more important, who would find you most appealing.”
3. **Activate your existing network of relationships**
 - “Who are most willing and able to help you. . .find the ones who have an established relationship with the companies and people on your wish list. Make sure they know what you are most famous for and the types of companies on your wish list.”
4. **Establish the content of value**
 - “Anything of ‘substantive’ benefit to your prospect: information, ideas, introductions and so on). Chapter 17 (pages 147 – 157) covers this in detail. “You have to identify something of enough value that the prospect will want to meet with you. Prospects need to believe it is compellingly worth their while to carve time out of their insanely busy schedules to spend with you.”
5. **Prepare to improvise**
 - “like a quarterback in a broken play, the best scorers are able to scramble and improvise a successful outcome to a play that doesn’t go according to the formula . . . Creative problem solving is an essential skill to hone in order to perform a proper business development scramble.”

This chapter concludes with questions relating to each one of these which Sam could and should have done or inquired of Roger before launching forward.

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As I now do in all my summaries, from this point on, I will cover things in much less detail and will reference you to parts of the book in hopes you will recognize the value of owning and reading the book to get the real value from Andrew’s great sales wisdom.

Section Two – OPENING STRATEGY

Chapter Seven – AVOID THE SCRUM

Roll Game Film

Perhaps a ‘non-Rugby’ version of the chapter title - although way too long - might be from Robert Frost’s, “The Road Not Taken” from the closing line: “Two roads diverged in a wood, and I – I took the one less travelled by, and that has made all the difference.”

Sam finds himself repeating Candace's mantra to himself as well as reviewing it on his iPad and even via handwritten notes: Right conversations. . .right time. . .right context.

What I like best about this chapter is that it zeroes in on two of the biggest challenges so many people who are in sales or just in any form of 'business development' have. And unfortunately, most don't realize either.

Candace drives one of these points home by first telling Sam to go stand in line for a refill of coffee behind 5 others, and then recants - reminding him that 'she' . . .as the owner. . . has the ability to make exceptions for special situations and special people. Her point:

“ . . .you can take the path that everyone else travels, and you can get in line with everyone else. Or you can look to find new options, new routes, new ways to get to where you want. And the easiest routes are those lined with people who already know you, like, and trust you; your friends,. You can't avoid asking and benefiting from their help. These days you have to.”

The two challenges which you can read about in more detail here are:

Sam doesn't see enough in his background and track record that really differentiates himself and although Candace somewhat agrees: *“All I meant was that you've got a pretty straight-forward backstory. And that's no problem at all. What you've got to do is figure out what you have to offer going forward.”*

The second challenge also points to 'the road less traveled'. Sam, like too many others, believes that: *“There's a reason the well-trodden path is the well-trodden path. It's worked for lots of people for a long time.”*

Candace's response says it all: *“Seriously? What generation are you actually from? Look around. Everybody's on a phone, on a tablet, on a laptop. This is a whole new world. What worked before may not work now, and what works now may not have worked then.”*

One of Candace's best pieces of advice that small or mid-size companies should always remember when deciding how to outwit competitors:

“ . . . you've only got three options when it comes to your competition: you go through them; go over them, or you go around them.”

Not wanting to take on Starbucks or even coffee shops that 'attempt' to create a collaborative, creative environment, Candace goes around them. Her differentiator is all about creating an '**authentic**' **community** you don't find in almost any coffee shop or spaces where co-workers hang out.

The balance of the chapter outlines and details the four main components that create a successful Opening Strategy:

1. **Clients.** *Who are your clients of choice?*
2. **Capabilities.** *What is it you do, and what are the biggest benefits you deliver to those clients?*
3. **Competitors.** *How is it that you provide a far superior result than your competitor can?*
4. **Consequences.** *What's the payoff for your client and for you from your great work?*

Coach Dietz breaks down each of these four into sub-categories and this section – pages 61-70 – is worth the price of the book by itself.

For example under “Clients” categories listed include: **Statistics, Similarities, Situations, and Suitability** and examples under each. Further dissecting how Andrew digs deeper, under “**Statistics**”, here are two of the seven questions he provides as part of what could make up a valuable “**Opening Strategy**” checklist:

Industry – “What is their specific field of business? What product or service do they provide?
Decision makers – Who within your ideal client is the typical decision maker? What is that person’s title and function? How old is that person? How was he or she educated/ How is that person being held accountable? How is that person rewarded? To whom does he or she report?

“**Similarities**” would include **those ideal client attributes** such as background, values, attitudes, or cultural style that are **similar** to you, your firm, and the best clients you already serve. Some of these are not necessarily similarities but rather just important information that will help you fine-tune your strategy. For example, under Goals, Andrew asks:

“What are the top strategic objectives of the organization and its leadership? What are the top strategic objectives of the key decision maker for your services? What motivates them? What concerns them? What roadblocks stand in their way? What has been this individual’s past interaction, success, or failure working with professionals like you?”

Under Dietz’s second category, “**Capabilities**”, he recommends you drill down to answer questions which range from “**What do you do?**” (both skills, products/services you provide, as well as what business are you REALLY in? (he reminds us of the railroad industry failing to recognize they were in the railroad industry but rather ‘transportation’).. . .

“**How do you do it?**” **How does it feel?** – which might also be worded as “*How do you make others feel?*” He suggests you complete the description of what you would most like a good client of yours to describe what it’s like to work with you?

Under Andrew’s third category, “**Competitors**”, I especially like the categories and questions under “**Attributes**” - “*where do you most and least favorably compare with your key competition?*” Here is one of my favorite questions:

“What one competitor or colleague would you most want to be compared to? What specific attributes of that competitor or colleague do you most admire? How does he or she develop business?”

Another sub-category under “Competitors” includes “**Substitutes**” – describing services that address the same client matters you do but with an alternative approach – technologies replacing many productivity measurement and activity manual tracking systems.

He describes a final sub-category under Competitors – “**Absolutes**” - circumstances that a client or prospect would not even consider a competitor over you? We could all use a few more of these couldn’t we?

The Fourth “C” for conducting a successful “**Opening Strategy**” is “**Consequences**” and as Coach Dietz says, it’s both **WHY** our clients and customers hire us, especially when they’ve done business with us before and see the results and outcomes of working with us, but it’s also what keeps our passion high: “*When a client tells me that our work together has changed his or her life, it makes it all worthwhile.*”

On page 70, Andrew offers a ‘fill-in-the-blanks’ “**Opening Story Format**” that can help you put your entire Opening Strategy together.

Although most people know me in my capacity and various roles within the context of being the creator of the NetWeaving concept, I thought I would apply this format in line with my ‘insurance roles’ which still provide much of my total income and is where NetWeaving really came from:

You know how most people who have been successful over their careers usually accumulate assets and property which they want to protect and eventually pass on to their heirs, or donate to charity, often discover that unforeseen circumstances, like a significant market downturn or major temporary drop in the value of real estate, can devastate their plans. That’s exactly the type of situation where I can help in a way my competitors can’t both because I have a background in shopping the market nationally for clients as well as helping professional advisors who are looking for the best life insurance products and product design for their clients, PLUS for some of the most successful and often older clients, my medical underwriting background gives me a significant ‘leg up’ with my ability to help clients obtain lower rates and in some case can obtain insurance when other insurance companies have declined them. Because of this, my clients experience greater ‘peace of mind’ and their heirs have assets to make theirs and their children’s lives better and to see the changes in their lives and business that follow.

Andrew suggests that you should ‘test’ your Opening Strategy and decide if it *is* “**unique, useful, and specific enough**”. The clue is IF it helps you decide **how** and **with whom** to most effectively spend your time, energy, and financial resources. On page72, he gives four specific ways to do so and I’ll cover one of them here and you can get the other four out of the book:

“Ask your closest contacts or colleagues to describe what they think you’re famous for. If they can’t do it or come nowhere close to describing your Opening Strategy, try sharing your proposed story with them. Do they get it? Does it strike true for them? Do they act on it by providing prospective clients or referral sources based on your description?”

Coach Dietz concludes this chapter and this section with a wrapup and review:

“Your Opening Strategy and Opening Story are guideposts to determine what is right in your business development efforts. They determine how you spend your time, with whom you spend it, and what you discuss. Your strategy and story determine how you present yourself, where, and when. In short they determine the connections, conversations and context that are most likely to help you win more often.

Don't miss some final tips to make your Opening Strategy 'come to life' and to be most successful on pages 72 and 73.

My favorite one was, "**Everything reflects strategy**. Ensure that all your client facing activities and materials are informed by your Opening Strategy, from your LinkedIn Profile to your proposals and right down to the granular such as billing statement messages.

Like any good coach, Andrew likes to 'diagram' his plays and so here is a diagram of the entire book and I'll just touch upon a few of points in the remaining three sections: **Right Connections: Right Conversations, and Right Context**.

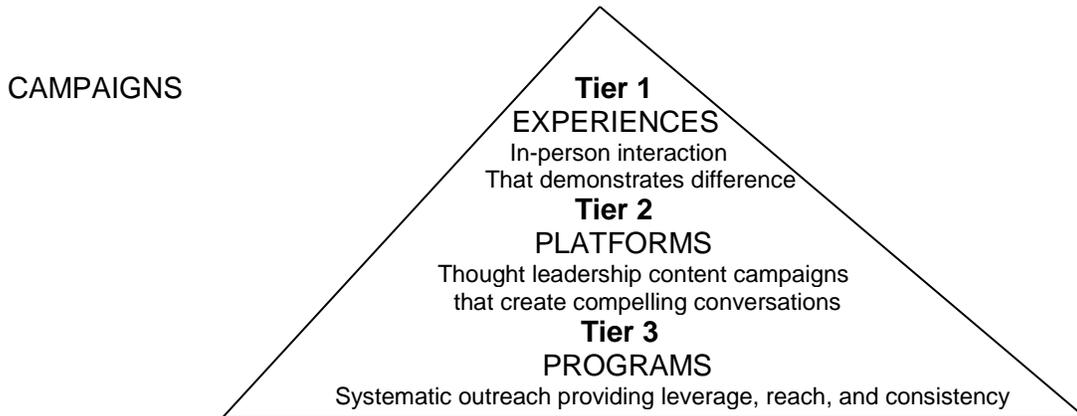
Right Opening Strategy

CLIENTS.....	Statistics Similarities Situations Suitability
CAPABILITIES.....	What You Do How You Do It How It Feels to Work with You
COMPETITORS.....	Attributes Substitutes Absolutes
CONSEQUENCES.....	Client Payoff Your "Why"

Right Connections: The Relationship Advantage

PRIORITIZE.....	Clients Prospects Prospect Executive
CULTIVATE.....	Increase Willingness and Ability to Help Balance loose and Formal Referral Sources
HARVEST.....	Introductions Information Insights

Right Conversations: The Information Advantage



CONTENT.....	Insights Introductions Income
CURIOSITY.....	Distinctions Opportunities Triggers Similarities
COLLABORATION.....	Cocreated Ideas Exchanged Truth Seeking

Right Context: The Experience Advantage

TONE.....	Cheerful Comforting Convincing
TRUTH.....	Authenticity Congruence
TIMING.....	Accuracy Frequency Longevity

In **Section 3 – ‘The Right Connections’** - you will find a wealth of information on how to go about discovering and ‘fine-tuning’ your RIGHT connections – both individuals, as well as organizations, as well as how to prioritize them. Also he touches upon your best referral sources – Existing clients; Other professionals, Alumni, and Community contacts – and most importantly how to approach them by **LEARN** – get your locker room speech down cold; **MODEL**- give a great referral before asking for one; **EQUIP** them with your story and best prospects for you, etc. and even possibly a ‘script’ for them – written out or by email; **ASK** for a

referral but do so with humility and respect. Why they would be doing your connection a favor by making the introduction; **ACCEPT** – *Graciously and generously accept help as it is offered.* **THANK** – Demonstrate genuine gratitude whether or not the connection has a positive outcome.

Very interesting quote from Andrew which I totally agree with:

“People who have done you a favor are more likely to do another for you than they would be if they had received a favor from you. They like you better when they’ve done you a favor.”

Section 4 – The Right Conversations - provides a Master’s program in creating value and in positioning yourself as an expert and thought leader. When, **not if** you buy this book, read this section over and over and if it looks too overwhelming for you to accomplish by yourself, look for ways you could collaborate with other parties to pull off some of the things covered herein.

For example on page 132, Andrew lists a number of the measures to determine the best marketing /business development platforms which help create thought leadership. A couple of my favorites include:

- *Allows you to ‘sell without selling’ putting you in direct, meaningful conversation with your best clients and prospects.*
- *Can be highly leveraged, allowing you to reach more people at the same time relative to the more one-to-one nature of sampling experiences.*

In covering conversations, **CONTENT** is fairly self-explanatory – make it ‘**something worth saying**’. . .something that ‘**engages the other person**’. . .and **CURIOSITY** likewise seems pretty straight-forward – and he reminds us – “*You become much more interesting to others when you demonstrate how interested you are in them.*”

But, the **COLLABORATION** one stumped me until he defined it: “*A conversation involves both people collaborating to find a higher level that neither one could have reached on his or her own.*” It’s stretching each other so that as Andrew says: “*You’re trying to demonstrate to people that you’re more than just a walking brochure.*” It’s a “*peer-to-peer exchange of ideas rather than a one-sided power struggle.*”

Pages 148 to 157 cover all three of these in much more detail and there’s a great chart on page 152 that anyone in sales or marketing should paste up on their wall.

In **Section 5 – The Right Context** – we learn about **Tone** – how you secure and engage those conversations; **Truth** – delivering each prospect experience with authenticity and congruence, and **Timing** - **WHEN** is the time to touch your best prospects and how often should you do so?

So far as “**Tone**”, Coach Dietz says, “*To get smarter about the one you set, train your eyes and ears by listening to others and watching them in action.*”

Under “**Truth**”, **Authenticity** is pretty self-explanatory but definitely worth reviewing what Andrew says about it, but I love the example he gives to explain “**Congruence**”:

*“Suppose you hold a new prospect encounter in a conference room at the Ritz-Carlton Hotel. The meeting table is shiny walnut with a porcelain tea setting and an orchid center-piece. Throughout the meeting you are clear, concise, relevant, and appropriately attentive. When it comes time to provide a leave-behind about your firm, you pull the documents out of a plastic grocery bag, flick some food particles from the cover, and toss the tattered, coffee-stained brochure to your prospect. That’s **incongruence** – when something you do or say is inconsistent with your stated or standard behavior.”*

Under “**Timing**”, Andrew says first to be “**Accurate**” - *“Great timing in business development means reading your prospect’s business objectives, watching for trigger points that affect the prospect’s goal achievement, and helping the prospect know how to respond.”*

“**Frequency**” – pertains both to the number of times to contact a prospect, as well as the ‘**quantity**’ of prospects and as anyone who is in sales knows, “**More is better.**”

Finally, Andrew says of “**Longevity**” – *“be a ready resource for your prospects over time; the more you’re in the game, the more you’re likely to get a hit.”*

So wait a minute, what ever happened to Sam? And I left out the part of the story where two other ‘**mentees**’ – Allen and Becca – join the mentoring process. Through Candace’s coaching, Sam actually turns into Becca’s mentor.

In a closing encounter between Roger and Sam, Roger voices his displeasure with the excessive amount of time that Sam is spending with the same prospective clients. But this time, it’s ‘*water rolling off a duck’s back*’. Sam recognizes that times have changed. The old ‘back-slapping’, ‘numbers game’ – ‘dialing-for-dollars’ – is *passe*. Roger won’t change his stripes because he doesn’t have to. He can ride out into the sunset thinking that ‘**his**’ past performance model is also the model of the future.

Candace has helped Sam recognize the new world of selling which is all about creating trusted relationships and delivering value, every step along the way, and after the sale as well in order to make it a life-long relationship.

The final chapter “**Winning in the Red Zone**” reminds us that we can do everything exactly right, but then we can still blow it in the “Red Zone” – those final 20 yards before the End Zone where things really get down to the ‘nitty gritty’.

Andrew provides some terrific comfortable ‘closing lines’ which I’ll ask him to share in person at our book club meeting and those who only are reading this, you’ll have to buy his book to learn them all. Here are just a couple:

“Based on our discussion so far, it seems like we’re well-suited to support you on this project. Do you see it the same way?”

“May we move forward to this? How do you suggest we proceed?”

We learn in the prologue chapter – “**CODA and Resources**” that although it involved an advertising agency rather than a law firm, Sam’s experience was really a ‘real life’ experience that Andrew had as a 23 year old in Manhattan.

Now Andrew owns and runs “**The Creative Growth Group**” utilizing all the tools he writes about in this book. And if you want to see for yourself, drop by and go there in person sometime; or attend one of his **Client Advisor Awards** program he puts on annually.

Thanks Coach Dietz. This is a great Playbook. We now know how to score and to really feel good about doing it, knowing it was a ‘**win-win**’ proposition.

P.S. By the way, Sam bought the picture of the boat, and got to know and appreciate the authentic and creative genius of the artist.