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Title: Build a Brand That Sells

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## **Build a Brand That Sells**

Cindy Leines

The next 50 minutes, I'm going to ask you to buckle up your seatbelts. We're going to take a trip together. Then we're going to talk about branding. Your job on this trip is not to be just a passenger, but rather to be a participant, and take a look at your company and your brand as we talk through this.

Ultimately, I'm guessing you came here with specific questions or issues that you're wondering about for your company. If I haven't addressed those by the end of the session, please, we will have time for questions.

But I do ask that you come with me on this journey, because it is a journey in brand. What we're seeing right now, over the past 12 months, more than we have in the last 10 years, is that service industries like the financial services industries are refining their brand because of the economy, because of all the things that we see in the media, in the news, and just what's going on in the world today. There is another message that needs to be heard. Sometimes it's not rebranding, but often it is about just refining your brand a bit from where it was 12 months ago.

With that, I also want to make mention of Business and Estate Advisors. They have been a client and are a great client. And like many of you, they weren't in problems. They weren't in dire straits when I got involved. I'd like to take credit for all their success. However, they were looking to kind of go the next level of where they were. They were very successful in what they did. They had lots of integrity. They were a great type of client to work with because it was really about how do we talk, how do we say our message, how do we redefine our brand so that people, our customers and prospects, can hear it.

How people hear things now and the messaging is very different than it was even five years ago. We are being bombarded by messages. Think about the internet. We've just heard about how to turn off e-mail earlier today. We all are getting bombarded by messages. So, suddenly our noise is so much, we have to surface to the top. I may be your best friend or you may be my accountant or my advisor, but how do you stay in front of me so I remember to give you referrals in amongst the time that I'm also running my own company? That's what we're talking about is how to make your brand, your identity sell for you.

Most of the time, we spend a lot of time working for our brand. We're working hard to be out there. We're doing presentations. We're doing all those things. But if we haven't taken care of the foundation of the brand, we're really missing the best ROI and the best opportunity.

So it starts from the very foundation and that is, what's in a name? All of you have business names. Some of you have been in business for years. You're all very successful. But what's in a name? Let's start quickly by this. Who is this? Joyce Penelope Frankenberg. How about Gordon Sumner? Good, very good. Jane Seymour. Gordon Sumner, Sting, that's very good. How about this one? What images come to mind when you hear the name Ralph Lipschitz? Is this the guy you think of? Anybody know who he is? Ralph Lauren, exactly. What's in a name? Pretty

different, Ralph Lipschitz to Ralph Lauren. Pretty different, Gordon Sumner to Sting. There were reasons.

Now these are people but they became the brands. So what's in a brand? Branding is about what made Kleenex synonymous with facial tissue; cotton swabs is now Q-Tips. What do you want your brand to be synonymous with? If someone says to you what's your company, what do you want it to stand for? That's your brand.

Now, in the service industries, we have the fortunate privilege really to be able to get a lot of free press, to be able to get a lot of free so-called marketing and help because it is a grass-roots kind of organic way to grow a business. How many of you have grown a large percentage of your business based on referrals and building relationships? It's not the only way we do it but it certainly is a key piece of how we do it in the services businesses. So branding becomes even more important, because we're about building relationships in those names.

What company is this? "The no-hassle card." Capital One, the no-hassle card, that's become their tagline. What's your tagline? Do you have one? You can do your branding in a couple of ways. You can have a tagline that becomes part of who you are and maybe has been who you are. We're going to look at that and say do you need to reassess it so your customer can hear it today. Or you may not have a tagline and you're going to do a campaign. Campaigns tend to be more short-lived, they tend to be one to two years, maybe five years if it's really good. Maybe it's a Nike campaign and it's a "just do it" campaign that they spent millions on and it worked beautifully. But, what is it that you want to be known about and are known about now?

If you have paper, just write down if you were going to give me one sentence, that's the most you get, to tell me what it is your company is known for, what would it be? We're going to come back to it at the end. What would be your brand?

I've been in business since 1988. I will tell you, we went through a brand morphosis as well and some of you have shared. It started out that you're a single entrepreneur or, if you're a small company, it maybe started out to be known by the owners of that company. Now what happens when you want to take it to the next step? How do you make sure the brand reflects something that will grow and build with you?

The best investment you can do, starting today, if you haven't already done it, is getting brand consistency. It's your best return on investment. Let's just put it in perspective. How many people in your company? One hundred people in your company. Let's just say there are 100 people and each one knows 100 people. Many of us know way more than that. What's that add up to? Ten thousand. What if those 10,000 people heard from 10 people your name and the same message over and over? That's pretty easy marketing. I can tell you, almost 80 percent of the time when we go into a company, whether it's a small company or a larger company, and we say to those 100 people, "Tell me what your company does." We often will get anywhere from 80 to 100 different answers. So just by looking internally about what your message is and what people are saying about you, you can have your biggest return on investment, especially in today's market.

Here's a task for you. Go back to your office next week and ask five people to tell you what we do. That's all I ask. And, if you get five different questions, five different statements, I would suggest you take some time to get your key message together on what your brand is and what you want people to say. It will pay off. Not only will it pay off for a return on investment externally, which is where we focus, but internally you will suddenly see new energy, especially after this year when there have been many, many companies who internally have experienced lots of changes or stress. This will help you take and boost morale. Because there is power in words. There's power in people working together.

The first thing we have to do is look at what's marketing. It's about creating and communicating, delivering and exchanging offers, not just for your customers, prospects and clients, but also for your strategic partners in your community.

So what makes you unique? We often focus on what makes me unique for my client? But what makes you unique might also be true for society at large or for your community at large. And that will become a key point.

Where do we start with the brand? Clients are stupid. Sometimes we think clients bury their heads in the sand or prospects bury their heads in the sand because we feel like we've told them what we do. How many of you have ever been in a meeting and somebody said to you, I didn't know you did that. And you think, how did I miss it? We've all been there. Another reason why you really need to be consistent. The more consistent we are in being able to engage in a dialog and then tell them the services, the more likely they can hear it.

In today's society we'll talk about it more, but it's hard to change people's minds. Once a client has made up their mind about your brand or they've heard your brand, because you haven't told them what your brand is, then they decide what your brand is. So either you control your brand or everybody else controls it for you. Once that happens, think about Xerox. How many remember when Xerox went from copiers and they brought out computers. They were never able to make it work. Everybody said they were copiers. I don't get it, you're not a computer. How about Coke when they brought out Classic Coke and tried "the real thing," to take that away. It was known as the real thing. They blew prestige. They blew money. It didn't work because they were known as Coke, the real thing. Volkswagen, what are they known for? Economical, small, reliable cars. They tried to bring out larger cars. Their brand was solid at the time and they lost more than 60 points by doing that and it never worked.

So, when you look at a service company like yours, changing a brand, changing a person's mind about what your brand is will cost you three to 10 times what it would to do it right from the start. You can refine it and help people move there, but changing it, if you haven't built it solid to be able to grow with you, is a lot more costly in the long run. So what do you say? Let's go back to what do you say. It's your building blocks. Key messages are speaking them consistently. Many of us want to tell our whole story. I will tell you, if you have more than three messages that you're trying to get out, no one is going to be able to hear it.

We live in society where we can remember maybe three things. If you've worked with somebody and they said you're selling eight products, you have eight messages, they're lying to you. We

have a college son now and if he remembers three I'm in good shape. Most of us are like that too. We don't remember three. I'm going to give you an example. We had an accountant who said he was tired of going to social events and activities and, when people asked, "What do you do" and she says, "Well, Hello. I'm so and so and I'm an accountant." They would say, "Nice to meet you. See you later." How many of you want to stand and talk about accounting? Maybe you guys do. I'm in the wrong group. Nobody really knew what she did because they all assumed they already knew what that group does. Change that to say, "What I do is take care of financial business so you can grow your business." And they say, "Well, how do you do that?" The point of your message is to engage people in dialog and conversation. Your message is not to sell them right up front. It is to engage in dialog and conversation. That's one of the biggest differences. And then to pull it together, to be able to go on with your sales.

You have an elevator speech. It used to be we got 15 floors to go up in an elevator speech and we actually had time to talk. How many floors do you think you get now? If you're lucky two to three floors. That's how much time you have to capture people's attention, it's not very long. Your business isn't a lot different than mine in that people ask what I do, if I say "I have a public relations firm," nobody wants to look dumb, so they don't dare say, "What the heck is that?" Instead they just kind of nod their head and say, "Nice."

We had to change that, very much in terms of refining brand, and said, "What we are is we're CEL. What we do is deliver your message to the marketplace in a creative, effective and lasting way." That's how you brand. You have to be creative, you have to have it effective and you have to have it long lasting. If you do that, it works and it will be able to grow with you.

Now I'm going to go back for you and say what's your brand? What is the most important thing you want to say about your brand? First you have to know your target market. Has your market changed in the last three years? Does anyone feel your market has changed? If it stayed the same, look at your market and say how are they receiving information? And the reason I say that is because technology has changed. We have this debate with many clients who will say my customer doesn't go to the Web. They really are paper and print people, and they might be. But I can tell you when you look at the facts and the demographics, the numbers are rising on people using technology and the Web to get their information on the 45-year-old and up. The 65-and-up is one of the fastest growing market segments. So if you're servicing baby boomers and you think they're not using the Web, I will challenge you that all of our facts and all of our numbers are skyrocketing. They may not be using it as a tool the same way as the 30-something is, but they are using it.

When I go to your Web site, what's the first thing I see? Is it your key message or is it just telling me about the products that you sell? If it's telling me about the products you sell, but it's not telling me your key message, then you're missing the boat on having that. What do they look like, what are they listening to, what are they reading? Are they quick and short snippets? Chances are, no matter what age group that you are working with as your primary market, baby boomers or whoever, they're still used to seeing and hearing things in short succinct ways. So where we again used to be able to use sentences and eight and ten bullet points, we now have to get it down to three. It is the hardest thing you will do of all your branding and marketing, getting it down to three key points. It seems simple. It seems easy.

The other thing that's changed is what's in it for me? We live in a me society. When you tell me what you do, you really need to tell me what you do for me. I'm your potential customer. What is it, what service do you provide that will make my life easier? We used to sell products, now you sell benefits. What is the benefit that you provide to me? With some folks, it's with interest in mind. With other people it's about creative effective, it's about the no-hassle card. Those aren't a product that you're providing, those are how are you making my life easier? And what you sell is definitely making my life easier.

What's in it for me? You have to differentiate yourself from competitors. The most commonly used words that don't work are: "I provide quality service." What is it? What does that mean? How do you provide quality service? What makes you different? So quality? I sell product (and they list their products). So does your competitor. They sell product. I provide great service. What does that mean? How do you provide great service?

I'm going to use Business and Estate Advisors again for an example. One of the things you have to do is get below the surface to figure out how you're different. Sometimes you can't see it yourself so you have to talk elsewhere. But the thing that really stood out (for Business and Estate Advisor) is there were some value-based propositions about integrity and honesty and all those things. But what stood out the most, as we really got under it, was that they were creative problem-solvers. It's not something you think about selling, but is that part of what you bring to the table? If I come to you, as a customer, and I don't know what I need, I only know that I want this outcome, are you creative in how you solve that? Isn't that part of the value that I'm buying? And does that set you apart?

In this case, it set them apart and needed to be important, so not only do we list what the product is, but we talk about creative problem-solving. It's far beyond just being products.

Controlling the brand or it controls you with your roadmap. There are a lot of things at your fingertips once you get your key messages down and your brand identity, what you look like, feel like, seem like. A font makes a difference. At the end of this, I'm going to show you what came out of *Brandweek* magazine, an example of all these different fonts. I will tell you that you will probably recognize five out of 10, at the very least. What do you use for your font? I'm going to show specific examples. Is it consistent on your Web site? Is it consistent in your letters, in the things you send out? It doesn't seem like a big deal, but let's put it from a customer perspective. Your customers come to you to take care of their financial details. They expect you to be detail oriented, probably more than any other industry. They expect you to be able to watch all those fine points and all those details. If you haven't taken the time to brand yourself in a way that's consistent, that watches the details, that has everybody in your office on the same page, you're giving a mixed message about the integrity and your attention to detail. So those details, in your industry, become even more important and what they say to people becomes pretty loud and clear.

The old way of branding was multiple-message, product-driven. I'm saying eight, but that's really only five to eight years ago. It wasn't that different. The internet has turned us upside down, not in all bad ways, but turned us upside down and shaken us and said we've got to do

things differently. Our customers and our consumers are looking differently. Now it is customized, it's simplified and it's benefit-driven. So when you look at your messaging is it benefit driven? Are you able to customize it to that segment or age group? And the most important thing, is it simple?

So I'll give you an example of old and new. The old: this is an estate advisor. Like I said, they weren't broken. It was "with your interest in mind." As we looked into what they did, we decided that "with your interest in mind" had a lot of integrity to it and their customer base really did understand that. They liked that, they thought that was important. One of the things that happened is people called them B&E. As you can see they were called B&E, but nowhere on any of their materials, except on their sign, did it say B&E. So we had to make a decision as a group to the customer, are we going to let people use B&E. If we are, then let's control it. Or are we just going to make them call the brand Business and Estate Advisors? What was decided was that it made sense. B&E was short. It was easy to remember. They already had some recognition in that, but they really needed to own it. They needed to own that and give it the quality and the integrity that the company had. We formulated an emblem that became easy to see, so when you're wearing a golf shirt, you can tell that it's B&E. Then we put "with your interest in mind." Changed the font. Gave it an updated look. It needed to stay strong. It needed to say solid and it needed to be consistent.

We have two other clients we're working with. One chose to drop their name completely, everybody was calling them the acronym. It was outdated. Their old name really didn't make sense to the new consumer. So we went with only the symbols of who they are.

Another company called Water and Energy Solutions we're working with right now. It has become evident they're going international. They are going to stay with water and energy solution. We have to change a whole internal group to say you can no longer call them WES, even though that was easy. The reason had to do with the branding and what the consumer would recognize.

Old and new. When you launch things internally, if you're taking in your key messages and you're going to relaunch that, one of the simplest ways, and this isn't rocket science but a simple way, to get people on the same page, is do what we call a key message card. It literally goes by your phone. Do something fun with your group and launch your new brand. Unveil it. Have a party. It sounds crazy, but what you want to do is get it memorable in their minds and have it be part of your internal boost and everybody saying it.

The key message card. We say put it by their phones so when they start to ask questions and start to have to answer questions, that you're easily able to remember it. It takes a while to get new people to say new messages. And the ones who have the hardest time are usually the owners, because we've been saying it for 20 years.

Simple things like letterhead. It just gives you an example of making it so when you get something you recognize. It's from your office. It's about your brand. Things that we take for granted.

The old and the new, your facts. I just want to show this because everybody has compliance here and a question was asked about compliance. Everything goes through compliance, obviously, but you'll notice that compliance is OK with us putting it smaller. To a customer, that's important, but it's far less important, and we want to make it look like it's easy to work with the company.

One of the things they do is they make it simple. They make it easy. They take care of details so what we don't want to do is clutter it and have consumers have to read all this information. That's what their intent was to do is to make it very easy. So, a change in that.

Again, for reports going out, nothing wrong with the old. They put their name, etcetera on it. It worked for years. They built a great business. But the consumer of today is hit with so many messages, they're used to seeing something polished. The consumer today is used to seeing something that has color in it, because, guess what, we can print cheap now. It used to be we had to go to the printing press and do hundreds of dollars of printing. Now you can do digital printing and look just like somebody who spent thousands on it. It makes it easy and you don't have to do large runs. Simple things to do, important details in your business.

This I want to just talk about briefly because it comes up on e-mail. People say, "Well, we do so much communication by e-mail now." Anytime we do a rebranding or a refinement of brand, we always look at how you're communicating via e-mail. How do we make that work? So again, it carries your brand and your message on that.

What do your clients really think? What are they seeing every time you send them something? Just take a look now for two minutes, just stop and think about what you're sending out in communications. Is there anything you would change? Once you get your brand refined and updated, the rest is easy. The hardest part and the most cost is really getting it done up front, and then you can make it happen relatively easily and inexpensively.

Sales tools. We talked a lot about "I don't need sales tool" in this industry. "I have notepads. I'm able to do that." One of the things that's important is how you tell your story. Your story might be your key messages, but you also have another story about how you deliver that product. In this particular case, it was important that people felt that relationship phase. It was small things like the office space. The other pieces, they had some beautiful photography in their office. Usually we can't use customer's photography because it's not that well done. But, in this case, the partners all had photography. What they've told us is that sometimes that works out nicely because they can point to it and say, "That's my kid," or "This is what I'm planning for retirement. What do you want for retirement?" Again, it becomes important.

You can do small runs of these. You can do large runs of them. It was really designed so you can put materials in there and be able to hand those out. The Web site, the same way. This was a strategy by which they used to talk with clients, whether it was a business client or an individual. So, again, just having the look and feel.

Meeting the partners. In the past, you could go and find the partner bios, but again you need it. That's part of the brand.

Someone asked me earlier, “How do I take the business from being about me to being about the company?” This is one of the ways. It is about the company. We branded the company, but the bio is a piece of that company in the background.

This is another example of the old versus the new. The old is, look at all the text. When was the last time you read that much text in a brochure? How many of you will throw away brochures? Brochures are becoming more and more outdated. Not that you don't need them, but if you're using them, what's happening across the industry is they're including less text and they're driving people to the internet. The advantage of that, on a brand standard, is that then you can change what's on your Web site without costing you much. Your return on investment goes up. The other piece of it is as you're branding and your key messages is to keep in mind how people are searching. What are the key words people search online if they're going to come and look for you? Because you want to make sure those are included in your brand on the Web site as well.

Consistency. An example, the University of Minnesota came out with the new stadium that you may or may not have heard about. It was a big deal. We worked with the premier seating and put together their brand in helping them sell and promote that. That all was happening on key messaging by one place. What happened on the PR side is we weren't hired for PR, but there wasn't good internal communication. One of the things they did is they told the media a different story. So when you do collateral, we go back to key messages, make sure that key message is what you take out to the media. If part of your key message has to do with being customized or being quick to respond and on top of it, some of those media stories might be, the minute a news story hits about something you have knowledge about you become that expert. So you become known for that.

If part of your message is about being a community giver and having high community and charitable giving, then what you want to do is be associated with those kinds of news stories as well.

In this case, and some of you may have this, this particular client had probably 20 messages. They had actually been branded by another company, well branded in terms of messaging, but there were so many messages that you couldn't figure out what it was. They do consulting for project management for technology.

Part of the reason this is important, that I want you to think about, is the owner of this company's story really tied into how they did business. The owners really had come from very little in life and had developed this company based on helping others succeed. It was based and grounded in the wheat fields and that became a symbol. Telling the story was about helping clients change and grow. This actually came from their mouth, “Call DAM.” And I will tell you that everybody in the company remembered because it became a joke. “Oh damn. What we do is define, analyze and manage. We define, analyze and manage business and technology initiatives.” Prior to coming up with that, everybody was saying something different. Now suddenly they could all remember it. It was define, analyze and manage.

The third piece was that they're professional consultants with superior performance, and that was really a third piece to their messaging.

What your message says, how and the more creative you can be to help people remember it, the easier it's going to be to maintain your brand and grow your brand.

So the top 10 most powerful wine and spirits. Smirnoff, Johnnie Walker. There are over 10,000 brands that have been looked at. You ask how in the world did they ever come up with that? How do you really rate? How do I measure up? I use this as an example because it helps you take a look at your brand. The hard measures are what share of the market do you have? In their particular case, it's volume based. In your particular case it's, if you are serving baby boomers within a certain geographical area, how many baby boomers? What's your share of that market? Is it based on numbers or is it based on a quality? Brand growth. What's projected for 10 years? Price positioning. In today's key messaging, one of the pieces that's different is that, in the last 12 months, value has become more important than price point. So how do you want to address that piece? It doesn't mean you have to give a price point, but somehow in your messaging right now I would encourage you to refine it and address the economy. If that's addressed by how you help them, or by how you can help them have long term monthly cash flow as they retire, or whatever it is that you can tie back into the dollars right now, I would put into a key message. That is the biggest change in the last 12 months that we've seen in every single brand refinement. I want to know about the value that I'm giving.

The market scope. Soft measures, brand awareness. If you were to take your brand, how many people in your market know your brand? Do you have visibility? If you've been kind of under the radar and what you're trying to do is make significant growth, you may need to do more brand awareness and have more visibility. How do you do that? There are lots of ways. Obviously, advertising. I will tell you I have a bias on the financial services industry in that if you're going to compete in advertising, you've got to have the revenue to do it. To buy a few ads doesn't pay off. You have to go into it saying I have to have a budget allocated for advertising and be consistent on an ongoing basis. If you don't have that or don't want to put that into advertising, then look at advertising that benefits not only your name recognition but perhaps one of your clients'. Imagine this: You've agreed to sponsor somebody who's a good client of yours who is having a charitable event. You've sponsored them and now you take out a full- or half-page ad and you've paid for that. What does that do to your client loyalty? Now your return on it is not only a PR return from it, but also you get the advertising return.

Think about it a little differently. That's the difference between a product and widget and a service business. If you're about building relationships, one of the things you want to do is take your ad dollars and ask: How can I build a relationship at the same time I spend advertising dollars? Usually you can do it. Somebody talked about radio shows. You're hearing more and more radio shows. Some have been very effective. Some of those are purchased buying ads on radio shows. Some of those are because you happen to have a talent and a gift for being able to be a good interview, so they'll keep having you back and keep coming back. Either way, but especially if you're not buying them and you're being an expert, make sure that you take that brand and you put it on your Web site. You let people know that you are that expert on that show. Again, it builds brand recognition.

Brand heritage. There was a question about what to do with a company that's been around for 100 years. Longevity. What we're doing is looking at the brand. How do I make it current and yet still keep the heritage of that? Sometimes that is as subtle as just giving it an updated look so it feels current. Sometimes it's about telling the story, but the key message is about what you do now for the future. There are very specific ways that you can take it. You never want to lose the 100-year longevity. It's what gives you credibility over somebody else. But, perhaps you don't want to look either. You want to look like you're on the cutting edge of knowing what's coming forward.

So your branding and your activities for that year may become very clear and very associated with current and future things. You may make a very specific mindset to say I am going to be sure to be interviewed by the news media on annuities, because that's hot right now. Or I'm going to be sure that we're going to write in a newsletter about the current topics. Or we're going to forecast, take away all this good information from here, write an article and put it out there on your Web site or out in the newsletter. That gives you the future look, while also having the 100 years of credibility behind you.

Brand perception. Loyalty and how close and how strong is the brand image. Sometimes we think we know our customers and we think we know what they think of us. If you're not 100 percent sure, I would tell you that it would be well worth your time to have either a staff person or better yet, hire someone outside of your organization, to call your customers and get feedback. Because there is nothing like it. You may find out that when they call, they're not getting friendly service. You may find out that your staff is doing unbelievably well on your key message. You might find out they had no idea that you sold annuities. Whatever that is, if you're refining your brand, spend just a little bit of time talking to your customers. Take them out for lunch and tell them you're refining the brand because you want to stay current. You will be amazed at how much people like to give you that feedback and that can be absolutely invaluable.

We're going to go to questions in one second, absolutely.

A quick thing, this will just help you think about the font you're using. What is it? This is from the *Brandweek* contest. These are all recognizable brands. Anyone want to take a guess? Who's the B? [IBM] Who's the R? Who's the A? Keep going. The Dell and Lee jeans I think are the ones, the last one is Trek. A lot of people say it's K-Mart. Audi is the A. *New York Times*.

Isn't it interesting how ingrained these are and we don't even realize it. Now think about your customers. How many times a year does your customer hear from you? Once a month, 12 times a year. Somebody else? Four times a year, 104 for A clients. Tell me all the ways you touch them? [internet, mailers, we call them...] So how important do you think it is to be consistent? Suddenly your return on investment. Take out an ad. What's it going to cost you? Give me a newspaper ad, because it's easiest. A half-page newspaper ad, what's it going to cost you in your market? \$3,000 a week, a day, for every ad. Can you afford to not be consistent? You really can't. You really cannot afford not to be consistent. It will make your life easier. How many people in your company? Nine. Nine people, they know 100 people. There's 900 people. I'd make a case that you'd be better off taking that \$3,000, putting it toward being consistent in your brand and getting everybody saying the same thing. And you'll get that payback in 60 days. Something to

think about. It makes logical sense and the return will be in different ways. Some of you will find that the return comes in a new client. Some of you will find that it comes in retention of an existing client. Most of you will find that suddenly your internal staff got motivated and so they're bringing referrals to the table. Or your customers are bringing referrals because, guess what, they know how to tell their friends about you.

If you asked one of your clients to refer someone, which most of us do, what do you think they say about you? You have to be up there and consistent to get that kind of return. You can, and it's not that we don't do well. Look, you're all in here because you've done well. You're all doing well. But when you want to go to that next step and you want to get into a market that you might have seen, you might have broken even over the last year or you might have had a decline of 12 percent (I think is what we heard might be an average in the industry), what is the most effective thing you can do right now? It doesn't have to take you a lot of time. That really is to look at your brand and make sure it's saying what your customers can hear.

So I go back to what is your brand? Now look at your paper and see if what you wrote down is what you think your brand should be after we've talked today. Is it what a prospect can hear, is it what a customer can hear? And if it's not, here's your task when you leave. Next week, go back and start thinking about what that message should be. Look at what your messages are now and what they should be or they could be for today and for the future. Because, here's the deal. If we listen to Gordon Sumner, every breath you take and every move you make should be guiding and should be a part of a brand consistency.

I will open it up for questions.

Q. I actually have two questions. First, we have a marketing director in our firm and he periodically calls our clients to give them a five- or seven-question survey which is always the same five or seven questions. My question is what you do when the clients or the person says I'm too busy. I can't talk to you right now. And they keep saying I can't talk to you. I'm too busy. Question number two is what kind of a budget should we expect to be spending on branding?

A. Question one, if they keep telling you that they're too busy, my guess is that they really don't want to talk to you. Or they might want to talk only to the partner or partners. It might be worth taking them out for lunch or taking them out and saying, "I'd just like to thank you for your business." And see if you can have a dialog. Otherwise, I wouldn't keep calling them back. I'd take them off the list, because pretty soon they're going to be irritated and then you've defeated your purpose. If you started to hear that from three to five people even, then I would say I would look to bring someone outside the firm and ask them to make some phone calls because it may be that there's a problem or a concern that they don't want to tell a staff person. Or it may be that the staff person hasn't totally been trained on how to ask the questions or how to develop that rapport on the phone. If you start to hear it more than once or twice, I would definitely look at either getting some training or having someone outside.

On the budget, always a good question. What should you be spending? If you look in the industry it's all over the board. It depends on your market kind of what the going price is on that.

Some folks will tell you that in certain industries you should be spending 7 to 10 percent of a gross budget on branding, marketing and promotion. Again, it really comes back down to how your market and your business is. Others will tell you 3 percent. What I will tell you is that there really isn't a magic answer. It has more to do with where you spend your money. Spend your money upfront to get it right and get that solid. Then the implementation becomes easier and probably costing you less long term.

One of the most important pieces of that is to do a roadmap. Have a year calendar and it's a roadmap. Just like any roadmap, you're going to have detours and some things are going to work. But what happens is from year to year you learn what not to do and what to do. You're funneling all of your money and all of your return on investment into one funnel. You're going to have better success because there will be some things that don't work.

The other thing is you have a fabulous group of people around here to be able to get information about what's working and what's not. I would really encourage you to use each other to say what's working and in your market and what are you doing. Some people will do seminars and they don't work, but sometimes it's the little part of the seminar, like making phone calls that got people to come or asking a friend to invite them, again about building relationship.

Q. I know I have to create a brand but I don't know how to create what my brand is. I don't have anywhere to target and ... comfortable. You get along well but still you don't have what it is. How do you find out? How do you define?

A. If it isn't your strength is to be able to really define your brand, I would encourage you to hire someone who does branding to come in and help you do that. You can find them in a lot of places. It can be a public relations firm similar to what we are. It can be a graphic designer who has a branding niche. That really helps. The most important quality that they need to have is they need to be good interpreters. They need to understand a market and understand how to put that into a design. I'm happy to help identify who might be able to help you on that. I would say most of the people we work with, they're fabulous at what they do, but being able to step away and see your own brand is difficult and that's why it's important to work with someone outside who can help you interpret that.

Q. Do you work with people across the financial services business?

A. We do.

Q. What is the optimum level of communication with big clients? You don't want to give too much and you don't want people to get irritated. If you could share your experience.

A. The question is what is the optimal times to be in communication with your big clients? I will tell you that most of the time, if you're going to be tapping their e-mail or if you're going to be talking with them in addition, once a month if there's not an issue related, is probably a fairly standard amount of time with a midsized client who you don't have a relationship building with. As you get to know them and if they're technically savvy, they will expect more. So you may do something on a quarterly basis in addition to meeting with them, in addition to having a once-a-

month communication. That doesn't include necessarily client meetings where you know you need to meet with them because they have specific issues. Most of the time when you look at your A clients, they should be hearing from you directly in that way. The other places that you want them to see you is you want them to see you if you've won an award, if you've written an article and you're in the magazine that they read. Those are places that they need to see you and want to see you, because we all want to be part of someone who's being successful. If you're an expert and you're being quoted and/or you're writing articles, those are all positive things and so they're going to see you but they may not have come directly into their mailbox.

I will tell you one of the things that we've been working with clients on is writing articles. If you're not a great writer, there are ghostwriters. You have all the facts and information. You can put it down and they can ghostwrite it and end it with your byline. That then goes out to your clients. It's information and education they need to know. They don't know all those things. Having it come with your byline, having gone through compliance, is a very good thing. It shows your expertise and credibility.

Q. Currently I am in the process of rebranding my agency. Over the last several years, I have spent a lot of money to advertise myself as far as my own pictures, agency. I saw a lot of people in San Francisco and Bay Area. They know about me. Now my agency has expanded to other areas, so I would like to rebrand my agency. In the process, we also rebranded our business cards as well as our Web site and everything.

I've used two branding companies so far. One of them suggested we should not put a picture on our business cards or our brochure. We have a tri-fold brochure. The other said, since you spent so much money over the last 25 years so people know you (I also deal with a lot of international marketing), why don't we just put your picture there. So I have conflicting suggestions. What is your suggestion to me?

A. Your question is do I put my picture on and our whole team picture on? Or just my picture?

Q. On our business card, I would just like to put my own picture and also my other member pictures on the business cards. So when we travel, people know who we are. For example, let's say some of us go to the party. We go out networking with people. We've got tons of business cards back. Guess what happens? When I come back to my office, I don't know who's who. Next day, I toss it away. So when there is a picture, I say, "Oh, I remember this guy." I believe I make bigger sales because my picture is there. One told me it will get outdated. You should not put the pictures there.

A. Here's what I can tell you. Everything has trends. If having your picture on there has set you apart, I would say you it should still set you apart. What I think they're saying is you want to look current. You can look current and still have your picture. There are ways you can do double-sided, but you can look current. But if what you're trying to do is brand your company, you want to make sure the most prominent thing on that card is your company name. When I look at that, what I see is that company name. The second piece is kind of a secondary piece, could be your picture because that's worked for you internationally. There are ways to do that. But what you don't want to do is have your picture become the brand. What you're trying to do

is expand your company and grow it and have others have the credibility with it. That happens a lot as you add partners. You want the name of the company to be the most significant thing you see and the picture becomes a secondary piece.

You could print both sides. You could open up. There are different ways you can do that, but you might have the name on the top and have it be smaller and you open it up and there's the picture of the person. So you're branding the name. What you don't want to do is brand a picture and not brand the name of the company. So make sure the name of the company is prominent.

Q. One question and it's more related to how do you look at AB testing of branding. Do you ever use focus groups with your best clients to come in and look at materials that you've prepared? Do you believe in that principle and if so, how do you use it most effectively?

A. Do I believe in focus groups? I do. I will tell you, in the service business and in this kind of a situation, you're talking about for branding, I use it for two reasons. One, I use it because I like the feedback. More importantly I use it because it builds relationships. Some companies, including Business and Estate Advisors, have an advisory board for both of their locations and they in fact took it to their advisory board for feedback. What that does is two things. It gives you feedback but it also gets them excited about your new brand. So, now they're out talking to all the people they refer. So there are two reasons I do the focus groups and I think it's helpful to engage key customers and/or referral sources in that process. It just gets them excited and it gives you some very good feedback.

Thank you very much.

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**Cindy Leines** is the founder of C.E.L. Public Relations, where she uses big-picture thinking to offer her clients strategic and creative solutions. Leines founded C.E.L. in 1988, with expertise in communications, community leadership, and volunteerism in the development of private for-profit and public nonprofit businesses and events. Over the years, C.E.L. has helped to brand and bring attention to local and national clients. Under Leines' leadership, C.E.L. has won numerous awards for their work, helping businesses and communities grow and succeed.

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