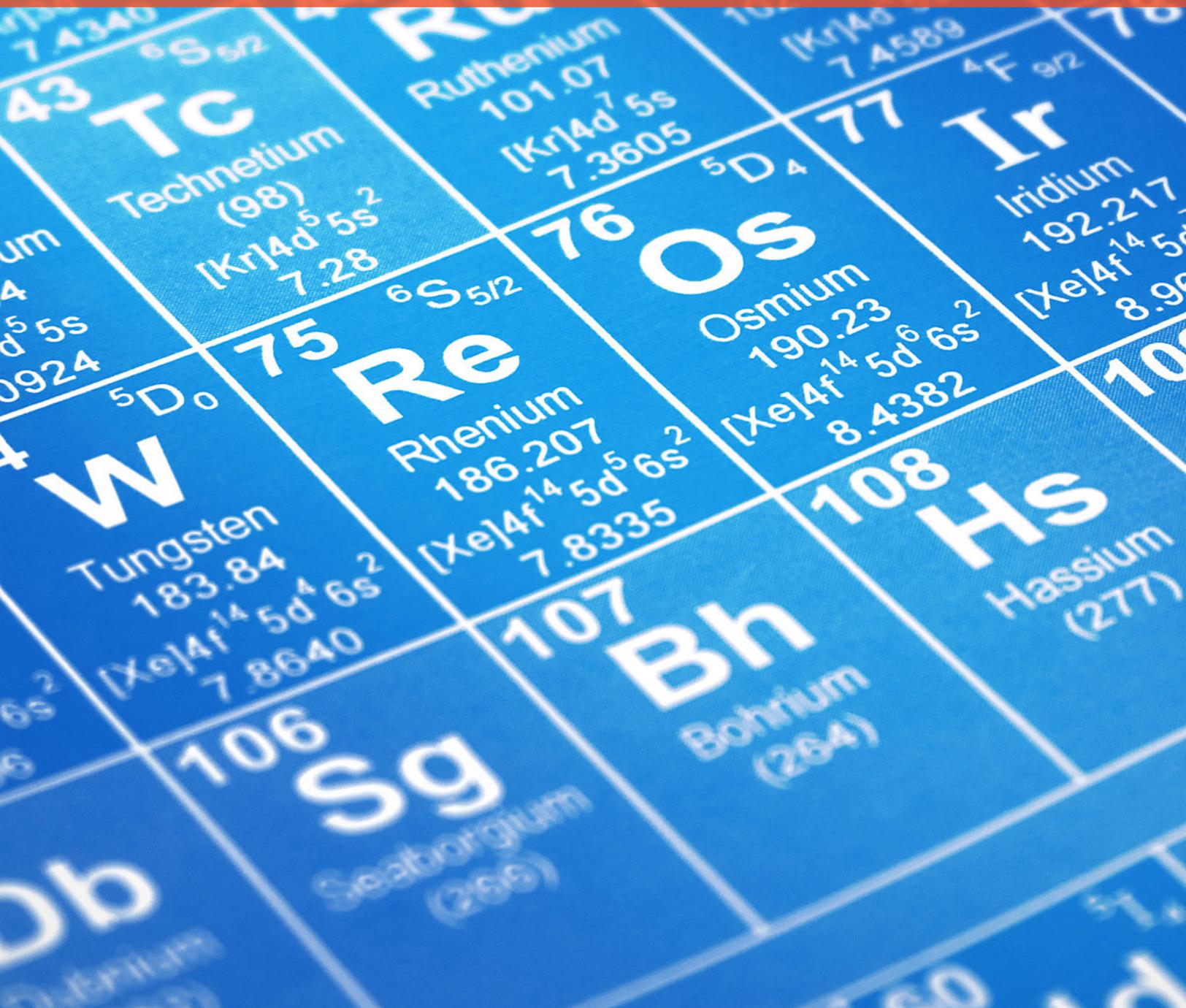


# The Seven Elements of Business Development for Professional Services

A transcript of an interview of Tom McMakin and Doug Fletcher, co-authors of *How Clients Buy: A Practical Guide to Business Development for Consulting and Professional Services*.



# Introduction

Frameworks are useful for teasing understanding from complexity, and there is little doubt that the professional services buying journey is complex.

In this second of a series of interviews, Andi Baldwin of Profitable Ideas Exchange asked *How Clients Buy* co-authors Tom McMakin and Doug Fletcher to explain The Seven Elements framework:

- I am **aware** of you.
- I **understand** what you do.
- I am **interested**.
- I **respect** your work.
- I **trust** you.
- I am **able**.
- I am **ready**.

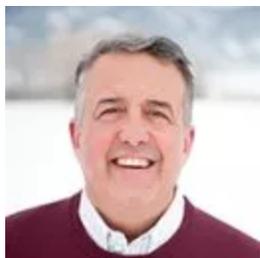
Tom and Doug emphasize the client's buying journey isn't linear, contrary to the popular "sales funnel" model of business development. You don't *drive*; you can cultivate and facilitate *buying*.

A handwritten signature in black ink, appearing to read "Dave".

Dave Bayless, Co-founder of Human Scale Business

# About the Authors

Tom McMakin and Doug Fletcher are practicing consultants who live the challenges addressed in their book.



Tom is CEO of Profitable Ideas Exchange (PIE), a leading provider of business development services for consulting and professional services firms. Previously, he held leadership positions in private equity and served as the chief operating officer of Great Harvest Bread Co, a multi-unit operator of bread stores. Tom is the author of *Bread and Butter*, a critically-acclaimed book that describes his work at Great Harvest and how he and his team created a nationally recognized corporate learning community and culture of best practices using collaborative networks. He has appeared on the pages of *Fast Company*, *Inc Magazine*, *Newsweek*, *Business Week*, and *The Wall Street Journal* and speaks widely. He is a graduate of Oberlin College and former Peace Corps Volunteer in Cameroon.



Doug currently splits his time between speaking/writing/coaching on the topic of business development in consulting and professional services and teaching at the Jake Jobs College of Business & Entrepreneurship at Montana State University. He also serves on the Board of Directors of The Beacon Group, a growth strategy consulting firm headquartered in Portland, Maine. Prior to that, he was co-founder and CEO of North Star Consulting Group, a technology-enabled consulting firm that specialized in global web-survey projects. Earlier in his professional life, Doug served as a consultant with the management consultancy, A.T. Kearney, and was trained at General Electric in its leadership development program. He is a graduate of Clemson University and has an MBA from the University of Virginia's Darden School of Business Administration.

# Transcript

**Andi Baldwin:** In "How Clients Buy," you offer a framework for the client's buying journey called The Seven Elements. Can you tell us a bit more about this and sort of how it came to be?

**Doug Fletcher:** Yeah, sure. I'll start out. So first of all, the approach we took was unique in that we looked at the client's buying journey as opposed to tips or techniques or things we might be able to do to improve our sales skills. So when we looked at the client's buying journey, Tom and I identified seven steps—elements, as we call them in the book—that we think a client goes through in making a hiring decision.

So The Seven Elements are awareness, understanding and interest. That's kind of like the first segment. The second segment is respect and trust. And then lastly, there is ability and readiness. So those are the seven steps that we believe you must eventually fulfill in order for a client to feel comfortable hiring you.

**Andi:** So let's maybe dig into those Seven Elements a little bit. Maybe you can take us through the first three—I think awareness, understanding and interest as sort of that first segment there. Maybe you can speak a bit about that.

**Doug:** Yeah. So the first segment is awareness. It may not be that earth-shattering that a client has to be aware of us before they can hire us. If you think about it from the client's perspective, it gives you a chance to reflect on what you are doing in your own practice. What are you doing to build awareness so that others are aware that you're a practicing patent attorney in Washington DC, for example.

The second thing is understanding. And it really comes down to choosing a specialty and becoming an expert in something that others can understand and can easily explain to other people.

And then the third is interest. The client has to find what you do relevant, and they have to see that what you do can have a huge impact on them before they become interested in possibly working with you.

**Andi:** And Tom, maybe you could take us through the second bucket there around trust and respect.

**Tom McMakin:** Okay. So the client—we've heard of a firm, and we know what they do, and it's relevant to our agenda. The next thing they do by way of diligence is ask themselves the question, "Do I feel as though this firm can do what they say they can do?" So they look for past clients for evidence of credibility. They look at your case studies. They look at your references. But they're always asking the question, "Okay, they talk a good game, but can they actually do that?" We call that respect.

And then the next issue is trust, which is a much more subtle human emotion. Sometimes we think of respect as your head making a decision about whether to engage with somebody, and trust is your heart engaging with somebody. Do I feel as though this firm and this professional has my best interests at heart, or are they going to take advantage of the fact that they know more about this subject than I do?

And it's often difficult to establish trust. The biggest single driver of trust between human beings is time. The longer we've known people, the more we trust them. But there are all sorts of ways to shortcut that and develop trust—accelerate the building of trust.

**Andi:** Finally, I think, ability and readiness were the last two items or elements in the last bucket. Maybe you can share what you'd say about those.

**Doug:** Yeah, these last two are interesting in that they really oftentimes are completely out of your control, right? And I'll explain what I mean by that. But just because they're out of your control does not mean that they aren't important and things for you to be attuned to.

So for example, the first one that you mentioned was ability. And what we mean by that is that a prospective client has to have the funds available to hire you, and they have to have the decision-making authority. And oftentimes, that decision-making

authority is not—it may be explicit, like it's on an org chart—but oftentimes, especially in larger organizations, there are other people in the organization that may not be the decision-maker. But the decision-maker will not make the decision until they have the support of other key people in the firm.

So being attuned to these things—recognizing, does someone have the budget for it? Do they actually have the funds to be able to hire us? They have the buying authority. They have the organizational support.

And then the timing becomes a big part of it—what we call readiness. Oftentimes, a prospective client is all on board with the help that we can provide them. They have the authority. They have the funding. But maybe there's some other crisis du jour going on. There's just something more important right now.

It doesn't mean that what you're doing is not important to them. Maybe it's important to long-term success. But maybe it's just not the most important thing today. So being attuned to these things, I think, can make a real difference in our success as rainmakers.

**Andi:** You've spoken about them a few times as steps. Does sequence matter? Is it like a ladder? How does that work?

**Tom:** That's an excellent question. I think the temptation is to go, first they see a billboard, so they're aware. And second, a buyer goes to the website and understands what you do. And third, it registers on a list of priorities that they have, and you walk down through [The Seven Elements] serially.

But as often as not, it doesn't happen that way at all. It happens out of sequence, and so we think of it as more of a circle.

You might go to a cocktail party and meet a woman who is a trust and will attorney. And you have no need for that, and it's of passing interest. And over the course of several years, your kids grow up and do Little League and soccer together, and you grow to know her and think of her as a high-character person. And then suddenly, your folks get old, and they're in need of a will attorney. And you're like, "I think I'm going to call Sandra. She seems like she knows what she's doing." So trust there was the first step, and interest and timing were later steps.

So people can enter the sequence in lots of different ways. I think it's a powerful model if you think of it as a portal to engaging with human beings from many different perspectives regardless of the sequence.



# HOW CLIENTS BUY

## The Real-World Guide to Selling Professional Services

A survival guide for every service professional, this book helps you up your game by schooling you in the secrets of finding, connecting with, and build lasting professional relationships with the clients you want and deserve.

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