

# The Power of Personal



Liz Whitaker  
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**As professionals we are broadly aware** of what it takes to retain and attract clients and how to execute business development and marketing strategies, but all too often success eludes us. Liz Whitaker's book, *The Power of Personal* and its introduction of the Propella Method sets out why and offers a solution.

The first part provides useful context of the world we live in and points out the value of personalised communication over broadcast marketing. This has always been the case, but especially now, given that the way people consume information has changed unrecognisably. We know that emails and social media are low impact and that phone calls and personalised messaging are effective, yet too many marketing departments are over-stretched delivering a continual flow of e-briefings and mass market events. The truly client-centred firms rein in these communications, focussing business development and marketing efforts on tailored client-based activity and structured multi-channel campaigns. As this book makes clear, the methodology and steps to implement this approach exist and the tangible examples of personalised client experiences are thought provoking.

The main section of the book presents a fail-safe method of information mapping, with models making it practical and clear. Grouping organisations and individuals will take time and scaling this for the size of firm or level of ambition is welcome advice. The four-box matrix is a helpful mechanism for plotting opportunities and the example provided which maps major banks is easy to relate to. The components of the 'Loyalty' and 'Royalty' axes could be simplified, however the point is made that these can also be tailored, for example by defining 'Royalty' in terms of financial potential. Plotting individuals on the matrix is where things get really interesting and illustrates

how the 'Loyalty' levels and 'Royalty' values of individuals in the same organisations could vary significantly. The different character types provide an entertaining and intuitive depiction of buyer behaviours and human psychology. While the characters are all recognisable I found some more easily identifiable than others and it would be productive to focus on those who could really make a difference, or those to be managed closely, for example the 'Ambassador', 'Prize' and 'Assassin'. We are also reminded to take a look at our competitors – always circling and described as 'Pirates'. There is helpful advice on how to deal with each character, as well as how to really get to know your client or target and make yourself indispensable. The point is also made that although the method provides significant potential for short-term gain, client development strategies should be long-term and may fluctuate over time.

Good key account management can prove invaluable and firms investing in dedicated client development managers to work closely with partners or senior advisers, as well as in a client-facing capacity, could achieve a competitive advantage. The book ends with useful tips for achieving a truly personalised experience and I love the reference to 'random acts of kindness' – a term coined by millennials to describe a simple concept, often lacking in today's world which seems so conflicted. This prompted me to consider the last time I did something thoughtful without expecting anything in return and when someone did the same for me and how much this meant.

An innate wisdom underpins this book, which is that genuine human interaction remains the key to success – a recommended read.

**Elizabeth Corcoran**  
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