

How to Connect,  
Convince, and Create  
Exceptional Client  
Relationships

# The Power of Personal



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I am very grateful to everyone who has contributed to *The Power of Personal* with interviews, case studies, and quotes. Please note these contributions do not indicate endorsement of the Propella software or process.

# Introduction

More work. Top talent. An easier life. That's what any professional services leader and partner wants for their business and themselves.

But selling high-value professional services in a fiercely competitive market is monumentally hard work and, for some, relentlessly unrewarding. For most professionals, marketing, business development, sales, PR, communications, or whatever it comes dressed as (these terms are used interchangeably) is *not* what you came into your profession to do.

I'm about to show you that the solution is staring you in the face. It's on the tip of your tongue and in your hands. Literally. It's already there in your client database, networks, and payroll. You might *think* you're

working in a business-to-business (B2B) or business-to-consumer (B2C) business. You're not. You're in the person-to-person (P2P) business.

*The Power of Personal* will show you how to find the diamonds in all that data. By connecting, convincing, and creating exceptional client relationships, you will build a competitive advantage that perfectly positions you to win more work and keep and recruit top talent.

To quote one very satisfied lawyer using this approach: 'You can stuff the competition.' *The Power of Personal* gives you a P2P marketing toolkit to win hearts and minds, shift opinion, and secure loyalty levels you thought belonged in the past.

## **Who are you?**

Before you set out on the Propella journey, there are some prequalification criteria.

*The Power of Personal* works for organisations selling high-value services in highly competitive markets. You will know the names of the people who matter, or it's easy to find them. Law firms, chambers, accountants, membership associations, independent schools, financial services, private wealth management, construction/property professionals, consultants, investor relations, charities/third sector, medical/

aesthetic services, design and creative businesses, and entrepreneurs can all benefit from this approach. Readers from these sectors, please swap the professional services vocabulary for your own.

The common denominator is that for your clients, there is a financial or reputational risk involved in choosing you. Trust is paramount, so it's crucial to create and *maintain* a relationship with your clients.

Extrovert or introvert, the Propella methodology can work for you. But what distinguishes my most successful clients is this: ambition.

You are on a mission to achieve something, and success is important for career, financial, or life reasons. You're smart and on top of your game. Your work really *matters* to you – it's not just a job. Oh, and you might be a teeny-weeny bit competitive.

Driven, yes. Very. Your full-time work is doing what you qualified to do, but you have a 'marketing/business growth responsibility' which needs to fit around the work. You and other fee earners have very limited or zero time or money for marketing. It certainly needs to be justified. Marketing skills and know-how might also be in short supply. You may or may not have marketing professionals advising you. You have a track record of satisfied clients and contacts. You rely

## THE POWER OF PERSONAL

on your team to deliver the organisation's advice, services, and total experience.

It's hard to get your voice heard out there, hard to get the edge, especially if you're a new, disruptor, or challenger brand competing with established (aka safe) players. Or you could be that established brand and need to update old perceptions.

You have to pitch for work and your reward may depend on what you bring in. You may have a management board and/or shareholders to keep happy. Your success is visible and possibly monitored by others. If you're not accountable to someone else, you're accountable to yourself.

You are also authentic, the real deal. You'll need that because *The Power of Personal* requires you to give something of yourself.

You might also be a current or aspirational CEO, practice manager, senior clerk, or marketing professional advising the above.

Truly ambitious people always reach their goals. Using the Propella methodology will speed things up.

## My story

I've worked in and around professional services marketing for over thirty years. That's included in-house and consultancy roles advising big, small, international, national, regional, and boutique firms, as well as membership associations, while working with partners, barristers, chief executives, practice managers, clerks, owners, and people *aspiring* to be one of these. They all want the same outcome: growth from existing and new clients, stability from people retention, and smooth recruitment of top talent. No matter what the client's size, type, or location, when I go behind the business façade, I will find one or more of at least 100 mistakes they are making which limit the potential of its marketing communications to achieve those successful outcomes.

I created the Propella process to avoid all these mistakes. Underpinning the process is the absolute truth that people buy from people, and they always will. That's what this book is about.

People also *work* for people, *vote* for people, *support* people, *donate* to people, *move mountains* for people. Future Propella grids will be created to support HR and organisations focused on voters, supporters, and donations.

Propella works. I've used it countless times. It's been eye-opening, game-changing, and often a relief for those using it.

Propella's origins go back to my parents' shop, where my teenage self worked on Saturdays and during holidays. In this business, respecting discretionary spend and looking after customers meant these customers came back. That meant more sales (although then, to be honest, my motivation was saving for David Cassidy LPs).

Later, armed with an English degree and an attitude, I started my career with Central Independent Television, a listed independent television company, which taught me a) the value of planning ahead for financial and reputational success and b) how marketing and communications could have a whopping strategic purpose and financial benefit.<sup>1</sup> It wasn't for decoration.

From there, it was into professional services. During my time as Director of Corporate Communications for what was then Wragge & Co, I was introduced to the stakeholder grid. That was the spark that ignited what is now Propella.

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1 In the 1991 franchise auction, Central Independent Television retained its franchise with a bid of £2,000 per year (fundinguniverse.com). To put this in context, Thames Television bid £33 million for its franchise and lost to Carlton Television, which bid £42 million (screenonline.org.uk)

In your hands you have a large dose of hindsight: the lessons I've learned so you don't have to. There are also observations borrowed from other sectors. Much of my client work referenced is confidential, but all the stories are true.

Of the quotations used, the quintessential one is 'Only connect...', from E. M. Forster's *Howards End*.<sup>2</sup> Firms are full of people eager to do good things but who have become disconnected from those who would be happy to help them – if only they could connect. By the end of this book, you will know how to identify and *meaningfully* connect with exactly these people.

## How to use this book

This book takes you on the Propella journey, from Prepare then to Plot, Prioritise, Plan, Personalise, Perfect, and Prepare (again).

Propella philosophy sits at the unexplored intersection between personalisation and technology. It's the best of the past, present, and future. This is smart thinking, and I recommend reading the book in the context of *your* goals.

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2 E. M. Forster, *Howards End* (London: Edward Arnold, 1910)

Professionals enjoy an explanation, so we start with why and consider what's happening in the world and to us. In the Prepare section, we lay the groundwork for creating the best possible circumstances to connect, convince, and create exceptional client relationships. You'll see how to avoid facelessness and improve your appreciation of people managing your invisible and visible touchpoints. I also share some tips that could mean the difference between communications success and failure.

Then we move into Plot, Prioritise, and Plan. This is where the magic starts to happen. You will be introduced to the Propella methodology, so you can plot the *priority* groups, organisations, and people who will make *your* success a reality. Professionals love Propella logic. You'll meet ten characters, starting with the most highly prized, the Ambassador, and learn what to do with them. This is all original material created by me based on years of business and people watching.

We finish with two chapters on personalised communication: Think Big, followed by Act Small. Perfect is about delivering the best possible marketing communications, and the final Prepare is about preparing for the success it brings. Don't complain to me if your diary is full of invitations, conversations, and more work!

I recommend reading this book from start to finish. Then, once you've 'got' how Propella works, you can dip in again wherever you wish. The Propella process can bring clarity to various situations, including merger-candidate search, event management, and crisis navigation. The Propella business intelligence software is a live, real-time, and shareable tool, but please be reassured that you don't *need* the software to apply the Propella principles or any of the advice shared in this book.

## Finally...

More work and top talent I can guarantee – if you follow the process.

An easier life? Ha, that might be trickier. But I can promise that time spent on marketing will deliver a result.

Think fulfilment not frustration. Think enjoyment not exhaustion. There will be magic, rather than manic, marketing moments of connecting, convincing, and creating exceptional client relationships.

The easy bit is realising you can just be yourself.

A handwritten signature in black ink, consisting of the letters 'Wiz' in a cursive, stylized font.