

# *Elevate your Marketing Efforts*

When I Need Help (WINH)

Second Anniversary Issue – September 2011

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CELEBRATE WITH MEMORIES  
AND A SPECIAL OPPORTUNITY

## *Contact Information*

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WELCOME to the second anniversary issue of  
*Elevate your Marketing Efforts!*

*With this issue, I hope to honor you, my favorite clients, supporters, and friends, by providing valuable content to build your businesses.*

*To start, here are two new resources:*

**How To: Trade Show** is your source for sales tips, marketing tools, and real life examples to improve your overall exhibiting efforts – access to this website ([www.HowToTradeShow.com](http://www.HowToTradeShow.com)) is complimentary and its helpful, educational content is available for you to view at your convenience.

Also, I have just released an exciting new short course to revitalize your lead generation efforts (please view center insert to learn more about “**How To: Quality Leads**” and page 15 for an opportunity to enjoy special introductory pricing).

Over the past year, I have had the opportunity to work with a great group of both new and returning clients at their events across North America (view pictures from some of these events on pages 14-15). My company, When I Need Help (WINH), helps exhibitors improve their results at conventions and trade shows by offering a full suite of services, customized according to each client’s specific needs. For example, on-site, I typically support exhibitors as an extension of their sales team and, as a consultant, I advise my clients through each stage of the exhibiting process.

*Speaking of... Do you have any events coming up? If you will require these services or know someone else who might, please contact me right away (my schedule from now through next year is filling quickly and I would like to make sure that I will be available to help you and your contacts with anything you need).*

Finally, When I Need Help (WINH) has been honored with award nominations and press coverage; but, more importantly, I have been proud to see my clients grow and prosper despite these challenging economic times. As I celebrate my company’s second anniversary, I hope you will take a moment to reflect upon your success this year as well.

*Thank you so much for your continued loyalty and support – please enjoy this issue,*

*Robyn Davis, When I Need Help (WINH)*

## *Exhibiting with Engineers and Executives*

As a small business owner with a degree in Aerospace Engineering who participates in a lot of trade shows, I often wonder why engineers and executives get such a bad rap from their colleagues in the booth.

The way I see it, having an engineer (or other technical expert) in your booth is a bonus because he actually creates your offerings and knows them better than anyone else. Also, your company's executives are great to see on-site because they care about your company's success and they have the authority to influence decisions (buyers love to meet executives). What could be wrong about that?

I know, I know... it's not always that simple. In my experience, there are four main challenges that come from inviting your engineers and executives to spend time in the booth. In this article, I'll identify these potential issues and then provide solutions so that you can better utilize the presence of these VIPs during your next trade show.

**Challenge 1: *Engineers may lack the social skills required to draw in and engage attendees who are walking by your booth.***

Most engineers won't be offended when their profession is stereotyped as less outgoing than others. In fact, there's an old joke about this,

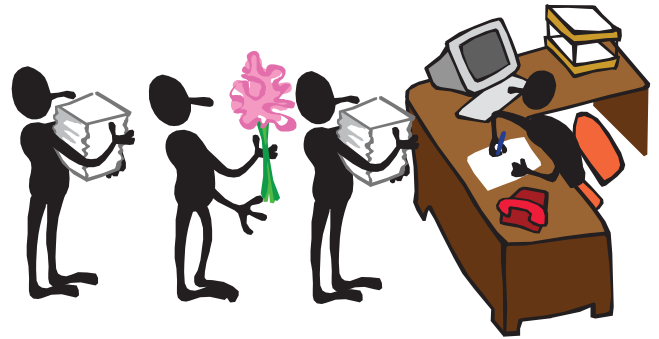
*Q: How do you tell the difference between an extroverted engineer and an introverted engineer?*

*A: An extroverted engineer stares at the other person's shoes when they talk (while an introverted engineer stares at his own shoes).*

That being said, especially these days, few engineers are socially inept.

Solution 1: Prepare before your event (discuss who will be attending, how the process will work on-site, and anything else that may have otherwise come as a surprise). Then, position your technical experts near the back of your booth and introduce appropriate visitors to them (instead of requiring your engineers to draw attendees in from the aisles).

**Challenge 2: *Executives may lack the patience for salespeople, attendees who are attending to learn about your industry, and poorly/unqualified leads.***



*Even while exhibiting, your executives will expect their time to be protected.*

In their regular lives, your executives go out of their way to protect their time, hiring assistants to screen calls and selecting only the most important meetings to attend. However, trade shows provide the rare opportunity for industry professionals to enjoy in-person access to your executives; you have a choice to make this a positive or negative experience.

Solution 2: Just like your engineers, it is important to position executives near the back of your booth so that you have an opportunity to pre-qualify any attendees they will speak with (if you discuss your executives' areas of interest before the event, you will be able to

make the most relevant introductions). Also, schedule booth staff shifts so that executives aren't required to spend extended hours in the booth (this further reduces their potential interactions with the wrong attendees).

**Challenge 3: Both engineers and executives may become too chatty about specific technical details, their vision for the company, and special projects they are currently working on or have just completed.**

One of the best qualities of engineers and executives is that they tend to be very passionate about their work. This passion is inspiring, contagious, and propels the kind of conversations that last for hours. The issue is that a trade show booth really isn't the right place for lengthy conversations like these.

Solution 3: Focus in-booth conversations by planning for organized demonstrations (or mini-presentations) with talking points, etc. which will progress from a set beginning to a set ending. Then, bring extra business cards so that you can manage the flow of traffic by politely interrupting a lengthy discussion and offering a way to continue later. Finally, schedule time for your engineers and executives to meet with important contacts outside of the booth (it is best if most meetings are arranged before you arrive in the convention city, but it can also be beneficial to leave a little flexibility to accommodate any last minute requests).

*Will the presence of your company VIPs help or hinder your team's performance?*



**Challenge 4: Your remaining booth staff may feel less comfortable around company engineers and executives, causing them to perform poorly in the booth.**

The presence of engineers and executives can be intimidating to fun loving, social booth staffers and, while a certain level of professionalism and attention to detail is important, it is not necessary to remove all of the enjoyable aspects of exhibiting to ensure your company's success. It is in everyone's best interest to do a great job on-site and it is your job to help them work together.

Solution 4: Oftentimes, a brief discussion amongst all parties can remove most of the discomfort. Explain to engineers and executives that your staff has been trained in exhibiting best practices so they can respect your staffers' expertise. Also, remind your team that they will need to be on their best behavior at all times (whether or not your company's VIPs are in the booth). Once everyone understands their roles, it will be easier to work together. If you are still seeing issues, arrange your booth schedule so that there is less overlap between the appearances of the most intimidating and intimidated staffers or add an extra representative to act as a buffer.

The key to exhibiting with engineers and executives is to provide opportunities for them to do their best. Remember that your company's VIPs aren't making your life more difficult on purpose; they are just as interested in helping your company succeed as you are (and in some cases more so). Help them do that by taking their strengths and weaknesses into consideration as you plan for your next event.

## *Did you know that consulting services are one of When I Need Help's most popular offerings?*

Other exhibitors, like you, have benefited from:

- General pre-/post-show advice
- Booth staff training
- Evaluation of booth design and on-site practices
- Structured pre-show marketing plans
- Review of literature/collateral
- Structured post-show follow up plans
- and More!

*Have you taken advantage of these offerings yet?  
E-mail [andmore@whenineedhelp.com](mailto:andmore@whenineedhelp.com) to discuss your needs today!*

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**LIMITED TIME OFFER:** MENTION CODE "WINH-2YR-C" TO RECEIVE A COMPLIMENTARY 30 MINUTE CONSULTATION WITH ROBYN DAVIS (MUST BE SCHEDULED ON OR BEFORE DECEMBER 15, 2011).

## *Should you Sell while Sick and Tired?*

*(Originally published in May 2011 by Sales Gravy and Salesopedia)*

Recently, I came across an article which, from the title, I expected to provide some tips for selling when one is feeling "tapped out" (we have all had those days, right?). However, instead of a motivational how-to style advice column, it seemed that the author was suggesting that when one is feeling this way, he or she should not be selling at all. I was even more surprised when I read the comments because they all seemed to agree with the author's opinion.

So, perhaps it's the competitive small business owner mentality in me, but just feeling a bit under the weather doesn't make the choice to "not sell" an easy one and it doesn't make me feel like I'd be "better off" taking a day to recover (assuming there was a choice to be made) without some serious thought.

In this article, I'd like to share a different opinion\*\* on this subject and some ideas on how I'd recommend weighing your options.

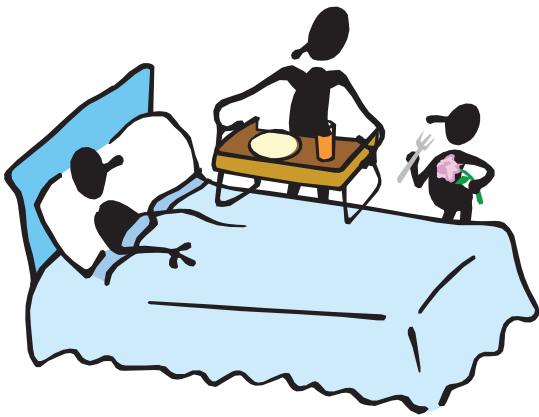
The main considerations when deciding if you should proceed with your sales responsibilities at all (due to your emotional/physical health) are:

**(1) Extent of illness** (are you suffering from a stubbed toe, some distractions in your personal life, or the plague?)

**(2) Urgency of responsibility** (are you scheduled for another set of daily prospecting calls or to attend a trade show that only occurs once a year? If it is the former, also consider the timing. For example, if today is Friday, could you complete your work for today and then be sick during the weekend?)

**(3) Necessity of your involvement** (is there someone else who could stand in for you with relative ease or do you need to be the person to take care of things? Be honest...)

As you know, with or without you, another work day will transpire. However, *as long as you are not also contagious*, if your illness is not extensive, your responsibilities are urgent, or your involvement is necessary, consider “Option One.” Otherwise, choose “Option Two” but only after you have made the appropriate accommodations, as listed here.



*Feeling under the weather? You have options.*

### **Option One: Power Through**

If you choose to power through your sales responsibilities, commit to them fully (no excuses). Understanding that you are not feeling 100% leads to an understanding that you must work harder to obtain the same results. Instead of trying to multitask like you do on other days, focus your attention on one task at a time. Taking copious notes while working on a creative or interpersonal task will help you to remain engaged and remember the details afterwards. Drink plenty of water, don't forget to eat, and monitor your condition (if you start feeling worse despite best efforts, take a mini-break to collect yourself and reevaluate your health before returning to

work). Also, don't be afraid to ask for help. Trust in the support system you have built to share some of your responsibilities and/or hire additional assistance so that you can focus on your most important action items while the others are taken care of as well.

### **Option Two: Make Time to Recover**

If you choose to make time to recover, make the most of that time. After prioritizing the tasks you had intended on accomplishing and considering your resources, delegate what you can and reschedule anything you can't. At the very least, provide instructions to your assistant so that he can pass along your sincere apologies. Then, focus on yourself by resting, drinking plenty of fluids, and following your doctor's advice for treatment. Also, don't replace work life stressors with personal life stressors during your time away. It may be difficult to shut out distractions, but you must focus fully on your recovery while you can because, if you don't, you may have to repeat this whole process again tomorrow (which puts you even further behind, adding to your workload and stress when you return).

You know yourself better than I do, so, although this choice can be a challenge for dedicated professionals like you and me, I hope these comments will provide the perspective necessary to help you make the right decision for yourself.

*\*\* DISCLAIMER: I am not a medical professional. Regardless of work concerns, your health is important; to ensure appropriate care, I would encourage you to seek the advice of a qualified medical professional whenever you are feeling under the weather. If there is, however, anything else I can do to help, please don't hesitate to contact me at any time.*

# 5 Free Ways to Stand Out as an Exhibitor

(Adapted from an article written for Growth University  
and published in August 2011)

Exhibiting is expensive, especially for small businesses. Impress your target audience by investing a little extra time and attention (instead of cash). Here are five free ways you can stand out while exhibiting at your next event:

## 1 – Revise your company description

Attendees use exhibitor directories to plan their time on the show floor. Take full advantage of the free listing you receive from show management: hook your target audience with a great opening, highlight your unique offerings, and help potential clients find your company by providing clear contact information.

## 2 – Cut the clutter

Minimize distractions by removing unnecessary furniture, leaving excess literature and boring giveaways behind, and letting your staff do their work. You've trained your team well and your high quality offerings are good enough to speak for themselves.

## 3 – Say hello

Attendees can easily be overwhelmed by all of the excitement on the trade show floor. Warmly greet the attendees passing by your booth to provide them with an extra opportunity to notice you.

## 4 – Maximize your time outside of the booth

Show that you are truly interested in forming connections by being present in the convention city. Schedule working meals with important contacts, attend event sponsored networking functions and educational sessions, and spend your free time wherever the attendees are hanging out.

## 5 – Follow Up

Rumor has it that 80% of the leads obtained at trade shows don't receive any follow up contact. Create a plan so that once you return (with notes about each contact on your list) your staff can call, e-mail, and otherwise reach out to these visitors right away.

With these ideas you won't have to worry about getting lost amongst your larger competitors. Remember, sometimes the best way to stand out is to invest your time (not money). Get started today!

*Having trouble  
deciding between  
a bird in the hand and  
two in the bush?*



**WHEN I NEED HELP IS HERE  
WHEN YOU NEED HELP!**

SMALL, SATELLITE, AND START-UP COMPANIES OFTEN OFFER AMAZING PRODUCTS AND SERVICES BUT GET STUCK IN TRYING TO DECIDE HOW TO SPEND THEIR TIME. THEN, THEY MISS OUT ON THE BEST OPPORTUNITIES TO PROMOTE THEIR AMAZING OFFERINGS – *HAVE YOU EXPERIENCED THIS?*

Instead of deciding between...

running your business and  
obtaining quality leads,

handling an emergency and  
maintaining your booth presence,

or

waiting for your target audience  
and meeting with key contacts  
elsewhere...

**CHOOSE WHEN I NEED HELP  
AND HAVE IT ALL**

*Call Robyn at (614) 657-7412 now!*

# Using Social Media to Promote Your Events

Which social networks are you using (personally and professionally)? Besides your website, where can your company be found on-line? With all of the new social networks popping up each day (have you joined Google+ yet?), it can be difficult to keep up. However, with a little planning and a lot of persistence, you can utilize these networks to reach your prospects, clients, and partners how it is most convenient for them. You don't have to fully understand each platform to use it successfully; with social media, the most important part is showing up consistently! Here are a few ideas to get you started with promoting your future events on LinkedIn, Twitter, and your blog:

## On LinkedIn

*Best for professional connections*

Update your personal profile and company page (especially your current title and company offerings) – select applications to enhance your profile too.

Join the groups affiliated with your event and its hosting association to network with attendees and other exhibitors.

Send a message to professionals in your network who may be attending your event (or who are based nearby) to coordinate on-site meetings.

Position yourself as an expert by participating in group discussions and responding to questions posted in LinkedIn Answers section.

Don't forget, LinkedIn doesn't allow self promotion (outside of your personal profile and company pages) – respect their rules.

## On Twitter

*Best for immediate updates*

Tweet about what you're enjoying at the event. Tell your followers which educational sessions are interesting, who is hosting a fun reception, and where they can find the best giveaways.

It's definitely a good idea to promote yourself too, just make sure that you're promoting others more (a good rule of thumb is to self-promote once after every eight or nine other tweets).

Include the event hashtag (i.e. #Event) in each of your relevant tweets to ensure that your voice is heard by anyone interested in your event.

Don't forget to think before you tweet (once you have tweeted something, it's out there... in cyberspace... forever) – keep your tweets positive!

## On Your Blog

*Best for original content*

Write posts about your planning (everyone loves a good "behind the scenes" story), share your opinion about topics that matter to your industry, and allow the event experiences you enjoy most to inspire future posts as well.

Submit your best posts to article directories for publication and consider guest blogging opportunities (in which you create unique posts for other blogs that speak to your target audience).

Read popular industry blogs and add your brief but useful comments to increase your exposure with new audiences.

Don't forget to integrate other types of media into your blog (like video and audio) to engage your audience with a more personal touch.

# Answers to your Toughest Trade Show Questions

**QUESTION:** What are QR codes and should I be using them while exhibiting?

**ANSWER:** A “quick response” code is a two-dimensional barcode that looks like a grid of tiny squares (as below). After downloading a (free) QR code reader or application, you can scan QR codes to obtain the information they have been embedded with (like websites, phone numbers, pictures, etc).

Try it out!



Scan this QR code (or visit [www.twitter.com/Robyn\\_WINH](http://www.twitter.com/Robyn_WINH)) to follow me on Twitter.

QR codes are still new enough that their presence on the average trade show floor is limited. To decide whether or not they would be a good addition to your exhibiting efforts now, consider your audience first. Are they comfortable with new technology? If your audience is unlikely to recognize a QR code, you will spend more of your time explaining how it works than you will spend discussing your offerings. Also, make sure that there will be cell/internet service wherever you display your QR code or else your audience will be frustrated when they cannot scan it properly. Finally, consider the amount of quality interaction you would like to see between your staff and interested attendees (depending on their content, QR codes may become a distraction from human contact).

If you decide QR codes are right for you; here are a few examples of how you might use them:

Scanning the QR code on...

- ...your pre-show mailer shows the recipient a promotional video encouraging them to visit your booth
- ...the literature you distribute in the booth takes the viewer to your website with more specific product information and/or ordering information
- ...the banner you sponsored shows the viewer information about the evening reception you will be hosting (like an invitation or map)
- ...the entrance to your booth enables your audience to join your mailing list or connect with your company on social media sites

**QUESTION:** How do you feel about using video in the booth?

**ANSWER:** Like QR codes, without proper consideration, video can be a hindrance to your exhibiting success. It is not beneficial to show video that does not align with your goals or that is not of a quality that properly represents your company.

On the other hand, video is a great way to attract attention (use movement and bright colors), introduce your offerings to attendees who are shy or approach while you are busy with others (ensure there is adequate white space so your message is clear), and aid staff conversations (include images and processes that cannot be shown in person). Above all else, any video displayed should not detract from the personal connections to be made on-site (at a minimum, remove the audio component to be considerate of both your staff and your neighbors).

**QUESTION:** My company is planning on using printed lead cards to collect contact information in our booth but we're getting a lot of resistance from staff; how can we improve this?

*ANSWER: The biggest issue most exhibitors have with lead cards is that attendees are uninterested in completing them (which is okay because attendees really shouldn't be the ones completing your lead cards – your booth staff should be). If your team is also uninterested in completing lead cards, it is probably for one of these three reasons:*

*(1) It takes too long.*

*To remedy this, provide a stapler and enough space in the contact information section to attach a business card. Then, provide check boxes to describe common interests and discuss a system of short hand notations to record personal notes. Finally, instruct your staff to complete the lead card during their conversation instead of waiting until an attendee has left your booth.*

*(2) The value isn't clear.*

*To remedy this, highlight the ROI obtained during previous events and note how many quality leads are required to produce one sale. Educate your staff on why each question is asked and how their answers will help the sales team during post-show follow up efforts - role play two follow up scenarios: one with a completed lead card and one without.*

*(3) Last year's lead cards got lost.*

*If switching to electronic lead cards (by renting a badge scanner with the same options as your printed lead cards) isn't an option, remedy this by creating a plan (and clear chain of custody) to ensure lead cards are delivered to the office and distributed upon return. Purchase a portable scanner or stop by an office store before leaving the show to duplicate the lead cards and transport those separately.*

**QUESTION:** What is the key to designing my booth space and backdrop?

*ANSWER: Simplicity. Studies show that you have between three and seven seconds to attract the attention of an attendee walking by your booth. For this reason, your booth display must convey your messaging in a very clear and concise manner.*

*Your backdrop should be uncluttered (as should your booth space) so that your company and offerings can shine. Remove unnecessary furniture (like trash cans and chairs) and be selective in adding standing banners, tables, literature racks, etc. Carefully consider the images available and use the one(s) that best represents your company and offerings at a glance. Reduce the number of words included as well (think billboard, not brochure). Finally, imagine how your booth will appear from the aisle after you have placed your backdrop, furniture, and staff.*

*When you think you're done, take a fresh look and edit your booth display one more time. Remember that everything inside should add value to the discussions your staff will facilitate with your target audience.*

**QUESTION:** Where is the best location for my booth space?

*ANSWER: There isn't one "best" location; instead, there will be multiple locations though out the exhibit hall that could fit your needs. Here are a few factors to consider:*

- Most attendees start at the front of the exhibit hall along one side and work their way through the aisles toward the other side.*
- Booths in the front of the exhibit hall will be busy right away and those near the back will see more traffic later in the day.*
- Some booths (those near bathrooms, anywhere that serves food/coffee, major sponsors, and entrances) will receive higher traffic regardless of their offerings.*
- Your target audience is most likely to go out of their way to visit your direct competition and any companies with complementary offerings (it is good to be next to or across from potential partners but can be problematic to be any closer than diagonal from a competitor).*

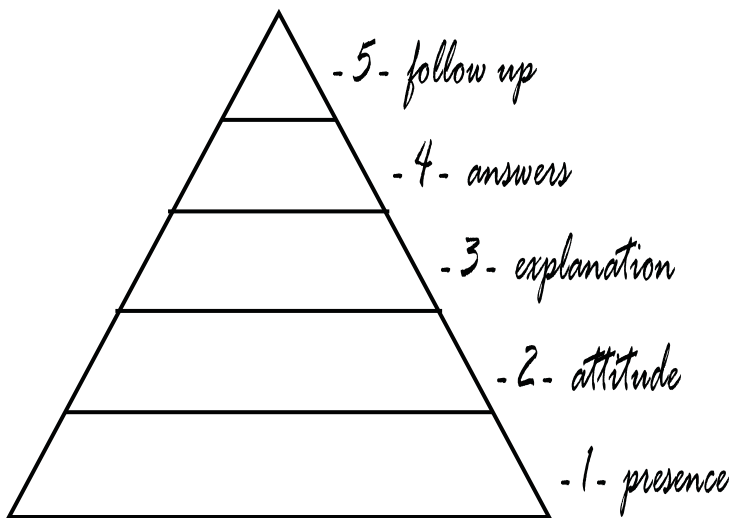
**More questions?**

**E-mail [info@whenineedhelp.com](mailto:info@whenineedhelp.com) for answers.**

# Pyramid of Staffing Competencies

(Originally published by Salesopedia in March 2011)

Your booth staff represents your company to anyone attending the events at which you exhibit. Take a minute to think about it; how are you being represented? If we were to create a pyramid to illustrate the competencies attendees are looking for when they visit your booth, it may look like this:



*Just as with any strong pyramid, this one is built from the base to the top.*

## **Tier One: Presence**

*Is anyone there?*

As an exhibitor, at a minimum you must ensure that someone is in your booth during any hours the exhibit hall is open for two reasons. First, this is required (or “strongly encouraged”) by show management and, second, this affects your company’s image. When your booth is not staffed, it appears that your company doesn’t care enough about their prospective clients to show up and meet them in person. To accommodate the meetings,

sessions, and other responsibilities your representatives will have to deal with during the event, consider scheduling your team for shifts of “booth duty” and/or hiring a capable hostess to maintain your presence while everyone else is away.

## **Tier Two: Attitude**

*Is anyone engaging attendees?*

Once you have scheduled adequate coverage for your booth, you’ll want to consider how the staffers you have chosen are representing your company. Their attitudes, demeanor, and apparent interest in interacting with attendees will impact the volume of visitors who come into your booth. Remind your staff to smile and follow the “be a good booth staffer” tips you have all read before. Then, if all else fails, remove the chairs for a little extra motivation (and, to inspire their cooperation even without chairs, spring for the double padded carpet).

## **Tier Three: Explanation**

*Can anyone speak intelligently about your offerings?*

After ensuring that your representatives will be facilitating positive interactions in your booth, you can shift your focus to their ability to converse with your visitors in a clear and confident manner. Attendees come to the exhibit hall to learn about the offerings available to them, so it is important that your staff is capable of clearly conveying your value proposition. To prepare your staff, teach them what you do, who you help, and how that

applies to the attendees they will meet. To support their encounters on-site, be sure to provide applicable literature as well.

#### **Tier Four: Answers**

*Can anyone answer questions?*

Talking about your offerings is one thing, but answering questions about them is another. Select booth staff who can answer questions patiently and competently so that attendees feel their needs are important to you and that your company is qualified to assist them as clients. To accomplish this, your staff will require additional training (you may consider role playing a variety of frequently asked questions to help them prepare). This is very worthwhile because another benefit of answering and asking questions in the booth is that your staffers can then learn enough about your visitors' needs to qualify them for your sales team – properly qualified leads commonly translate to a solid return on your investment after the event.

#### **Tier Five: Follow Up**

*Will anyone keep their promises after the event?*

Finally, instruct your on-site representatives to record notes along with the contact information of qualified leads. In doing so, you will be able to keep any promises that were made (for example, requests for

additional information, a demonstration, or specific pricing). As long as there is a plan in place to sort through the leads and follow up according to the notes taken, this will help to prove to attendees that you are reliable (this is a great first step to being seen as trustworthy). Create your follow up plan before the event so that all promises can be fulfilled as quickly as possible afterwards.



*Your visitors are waiting for the information promised to them – will they receive it?*

This pyramid should serve as a guide for how you might help your staff to better represent your company by attending to the needs of your visitors. If you are involved with the staffing for your next event, take a few minutes to consider whom you have selected, into which tier they would currently fit, and how you can improve your booth presence for next time by helping your staff to progress through any remaining tiers.

For more great articles, visit [www.HowToTradeShow.com](http://www.HowToTradeShow.com) today!

HOW TO: *trade show*

SALES TIPS, MARKETING TOOLS AND  
REAL LIFE EXAMPLES TO IMPROVE  
YOUR OVERALL EXHIBITING EFFORTS

## Quick Tips

...for Business Travel

### 1. Pack multiple bags

If you will be traveling to multiple destinations or meetings, pack the items you will need for each location in separate bags (you may need to pack multiple small bags inside one larger bag for convenience).

### 2. Organize your travel documents

Assemble a folder (electronic or hard copy) with your agenda, necessary contact information, confirmation numbers, meeting notes, directions, and other important information so that it can be easily accessed.

### 3. Bring extra business cards

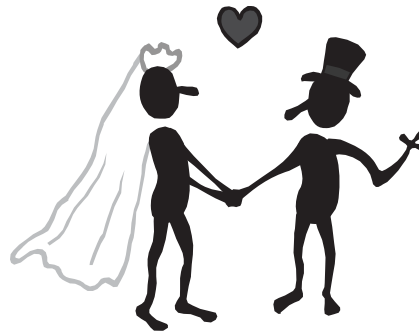
Don't miss any connections while traveling; prepare yourself for any networking opportunities that arise during your trip by bringing extra business cards and practicing your personal introduction.

### 4. Reset your watch

To reduce jet lag, adjust your mindset immediately. Set your wrist watch to the time zone of your final destination when you leave, then glance at your phone or other self-setting device if you need to know the actual time before you arrive.

## Playing "Matchmaker"

As you continue building your network, you are likely to come across opportunities to connect your contacts with one another. Sharing your contacts in this manner can be very beneficial to all parties; however, if proper care isn't given to your recommendations, they could negatively affect your relationships instead.



*Are your contacts really meant to be?*

### First, judge the fit.

No matter how desperately your neighbor needs a job or your sister's best friend needs an employee, if they aren't compatible, neither will truly appreciate the introduction.

### Next, consider the value of your relationships.

Before you make an introduction, weigh the importance of each relationship against the risk involved and proceed only if you are willing to accept that risk. If either person is like family to you or provides a commodity you cannot live without, proceed cautiously. It's not selfish to include yourself in the equation, it's smart.

### Manage the expectations of both parties.

Be honest in each recommendation so that your contacts will have an opportunity to consider the situation from all angles before deciding to proceed. Don't forget that, regardless of your relationship with either contact, there may be personal considerations that you are not aware of that will also impact this decision – it is important that you are clear in your explanations so that you don't find yourself accused of over promising or under delivering.

### **Assist with preparations however possible.**

Once an agreement has been reached, take the management of expectations a step further by providing your inside tips to help each contact (especially the job seeker) put her best foot forward. Pay particular attention to personalities, communication styles, and your connection to either party because, within your previous interactions, you have built a reputation that you are now attaching to each contact. However, at the same time, you must understand that your contacts will soon begin transitioning your introductions into their own relationship, which you cannot (and probably would not want to) control.

### **Finally, check in periodically...**

As you speak to your contacts in the future, remember to ask about their new arrangement. This serves two purposes: first, it helps to strengthen each of your relationships because you are taking an interest in their lives by remembering something that is relatively important to them (just like when you ask about their family, hobbies, or goals); and, second, this provides an opportunity to maintain your excellent reputation. If there are issues that have impacted either contact's opinion of you, it is important that you find out as soon as possible.

### **...and consider doing "damage control" as needed.**

If and when personal issues arise, you may consider stepping in to facilitate an improvement. Remain neutral in speaking with each contact to understand the situation and respect both parties if you choose to involve yourself – sometimes a fresh perspective is all that is needed to clear up a misunderstanding that otherwise would have the potential to spiral out of control. However, at that point, your fresh perspective may also highlight previously hidden attributes associated with either contact (like unpleasant personality traits, disrespectful conflict resolution styles, etc). If the new information you uncover results in a situation that warrants it, you may be faced with a difficult decision as to if/how you will (or will not) proceed within your own relationships.

Playing "matchmaker" can be a dangerous game, but by following these steps, you will have a better chance at connecting your contacts successfully (in a way that benefits all parties).

## *More Quick Tips*

### *...for Business Travel*

#### **5. Maintain healthy habits**

As much as possible, eat the same types of food, enjoy the same level of activity, and obtain the same amount of sleep as you do when you aren't traveling.

#### **6. Appreciate your new location**

Find an opportunity to soak in the local atmosphere and appreciate your situation – whether it's a quiet moment of reflection in the early morning or a full afternoon of sightseeing.

#### **7. Bring a memory from home**

To reduce the mental stress and strain associated with being away from home for an extended period of time, pack something special (like a picture, piece of jewelry, or personal letter) to remind you of your loved ones. Glance at this object anytime you become homesick.

#### **8. Join the loyalty programs**

Hotels, airlines, rental car companies, and even gas stations have loyalty programs. By becoming a member, you will be treated better now and earn rewards to be applied to your future travels.

# Celebrate the 2<sup>nd</sup> Anniversary of When I Need Help



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## *Goal Setting: Consider Needs and Wants*

*(Originally published by Salesopedia, Sales Gravy, and TSNN ExpoFiles in February 2011,  
Selected as one of the Top 10 Sales Articles of the Month in April 2011)*

In the initial planning stages of any event, I encourage my clients to set two goals and I would encourage you to do the same. These particular goals are especially important during the planning process because they can help you in selecting appropriate events for your company, facilitating your team's understanding of why you are exhibiting and what is needed from them, and determining which marketing methods should be employed to maximize your results. Specifically, the two goals I encourage my clients to set are a "needs goal" and a "wants goal."

First, a **"needs goal"** is what you must accomplish in order to break even at an event; this is the objective you *need* to complete so that the event does not hurt your company nor is it remembered as a terrible failure. To set this goal, take a few minutes to consider what you have (or would have) invested in your event (time, money, energy, etc.) and how much that is worth to you (it may be your total financial investment plus a small percentage to account for the time, energy, and other intangibles invested).

The main benefit of identifying a "needs goal" is in better understanding your investment. Sometimes, professionals decide to exhibit at a new event or implement a new marketing strategy because it's "fresh" and the "only way to stay ahead of the times" or continue a tradition of exhibiting at an old event with the same marketing techniques because "it is what has always been done" (neither of which, in and of itself, makes a sound business decision). Regardless, evaluating what you need to accomplish can help in finding the events and approaches that are the correct fit for your company today.

*[If you **cannot** reasonably expect to accomplish your "needs goal" at your next event, there is a problem with the fit of the event itself or the approaches you have selected for that event.]*

Next, a “wants goal” is what you would like to accomplish if you were exhibiting in a near-perfect world; this is the objective you *want* to complete so that the event exceeds your expectations and is remembered to be a great success. Sit back and dream a little to determine your “wants goal” – this may be a financial goal, but is also likely to have some intangible components (better connections with current/future clients, greater team morale, improved visibility in your industry space, etc.). Don’t forget, even with intangible components, you still want your goals themselves to be measurable.

The main benefit of identifying a “wants goal” is in motivating yourself to start thinking bigger. Exhibiting brings a world of possibilities to those involved but if you haven’t started dreaming about specific areas within which your company would like to improve, you may not be able to see the opportunities available to maximize your overall results. Brainstorming creative methods to accomplish your “wants goal” is one way to include your team in the event preparations and begin building team ownership of your collective results.

*[If you can reasonably expect to surpass your “wants goal” at your next event, your problem is that you haven’t started thinking big enough yet.]*

If you are just starting your planning for an upcoming event, I would encourage you to personalize these goals to your situation and refer back to them as you make each major decision along the way. If your event is past the early planning stages, you can still incorporate these goals into your remaining planning and on-site efforts. So, wherever you are in your preparations, get started today in taking the necessary steps to ensure that you surpass your “needs goal” and continue striving towards your “wants goal.”

*In celebration of the second anniversary of When I Need Help,  
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