

Building advocacy relationships in business

Advocacy marketing is a powerful and, arguably, essential component of any business's marketing strategy.

A referral relationship, or advocacy relationship (I am using the terms interchangeably), is a relationship between two businesspeople designed to deliver warm leads to each party. The leads are referrals because each party refers those of their contacts who are suitable to the other. Advocacy is key because the relationship relies on each party advocating the other to their contacts, and not just passing on name and address details.

The process can be extended to similar relationships where one or both parties is not a business: for example a charity, a public sector body, government funded business adviser (eg Business Link), quango, and so on.

The process can also be extended to advocacy relationships where one or both parties doesn't receive leads from the other but some other benefit. This could be as basic as money (though I don't recommend this as it contaminates the relationship). Other benefits are discussed below.

What are the benefits?

- (1) The value of the relationship is that the contacts who are referred know and trust the person doing the referring and therefore the recipient can have confidence that the leads will be receptive to the recipient's offering. It is highly efficient.
- (2) The principal benefit is that, once set up, the relationship should deliver high quality leads for relatively little further effort and cost.
- (3) It can be a route to prospective clients who are virtually unobtainable by any other way.
- (4) If I refer my client to you because you provide a service I can't offer, then my client sees me as being helpful and it reflects well on me. It is almost as if my portfolio is extended by the addition of your services.
- (5) If I know you are referring all your appropriate contacts to me, then I know you're not referring them to my competitors. That may be an issue for some people.

What are the drawbacks?

- (1) The process of setting up a successful advocacy relationship requires a lot of time – more time than you think – both actual time spent in discussion and elapsed time, the timescale over which the discussions are held.
- (2) It is possible to discover only late in the day that two people intent on such a relationship can't (or won't) bring it about.
- (3) It requires time and commitment if it is to be sustained.

Criteria for selecting potential advocates

There are numerous criteria for selecting a potential advocate with whom to go through the process of developing a referral relationship.

Here are some *essential* criteria:

- (1) they provide services in the market sector you want to get prospects from
- (2) they provide 'adjacent' services or products; ie, they are not competitors, but what they do has some relationship to what you do. In the area of disputes and litigation, a lawyer and an accountant should make suitable mutual advocates. Likewise, a business coach and an HR consultant is a good pairing. Or a builder and an estate agent
- (3) they can deliver the number of leads you need, ie they know enough of the right people
- (4) they are trainable: you can be confident they will give an accurate, consistent message about you
- (5) they understand what you do: so obvious, it is often overlooked
- (6) they understand what you need from them and why
- (7) they value you and your business
- (8) you are happy with their reputation and the level of respect they have
- (9) they are giving by nature, and willing to give to you, in particular
- (10) they have the necessary time and resources to develop and maintain the advocacy relationship
- (11) **you are enthusiastic about them!**

This last point is probably the most important, the most necessary and, while it is one of the easiest to test, it's also one of the hardest to achieve. But, if you are not enthusiastic about them and their business, you simply won't pick up the phone and advocate them to your contacts. Why would you? And if you don't, how can you expect them to advocate you to their contacts?

That is a lot of criteria, almost all of which will apply in almost all cases. You need to be canny about using networking events and one-to-ones to filter possible advocates before embarking on a lengthy process of forming an advocacy relationship.

Also, consider using the advocacy process with a connector simply to have them come up with people who might be good advocates.

A final thought: advocates should be clients

This is a counsel of perfection which isn't always possible. However, the first group of people you should consider as advocates are current and past clients. They should have a good knowledge of what you do because they have been on the receiving end of it. You won't ask them to be an advocate unless you're sure they are happy with what you do/did for them. Of course, they may fail some of the other criteria but the enthusiasm should be there both ways.

If you successfully develop an advocacy relationship, strongly consider becoming each other's clients if that is at all possible or relevant.

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