# Setting up successful advocacy relationships

Two things must be achieved if the referral relationship is to take off:

1 - each party must have adequate information and understanding about the other's business

2 - each party must have surfaced and dealt with their reservations about having the relationship before it starts.

This second point is so vital, yet it is usually overlooked.

Achieving both of these properly is what takes the time.

I recommend a four stage process.  These stages correspond with Ivan Misner's Visibility, Credibility and Profitability stages plus an essential, and ongoing Maintenance stage.  Each stage could involve a number of meetings (eg a factory visit, or a meeting with a colleague) as well as phone calls, emails and so on.  For simplicity here, I have described each stage as one meeting.

Also, for simplicity in the following, I am assuming that you are one of the parties and this is written from your perspective.

It is likely that, whereas you have been on an advocacy course, the other party won't have.  I strongly advise being completely open about the process.

## Stage 1:  Exploratory meeting

This meeting will probably take the format of a typical networking one-to-one meeting.  Indeed, it might be a networking one-to-one meeting, at the end of which it occurs to the parties that they could it take further.

So, typically an hour, with each side having roughly half the time to talk about their business, but also about themselves.  Any future advocacy relationship will depend in part on the parties liking each other and that process cannot start too soon.

If you feel the relationship could be developed along advocacy lines, say so at the end of the meeting.  Be prepared to say why you think this (more on choosing advocates later).  Explain the process (including the bit about reservations).  Suggest you both go on to stage 2.

If the other party disagrees, let go of the idea.  If they agree, gently ask them if they might have any reservations.  They can probably see the benefits and it might hard for them to imagine anything could go wrong.  Suggest they think about it between now and the next meeting.  If you can think of your reservations, you might mention one or two – they could be deal breakers and you'll save a lot of time getting them out in the open now.  On the other hand, they could be easily resolved, so why not do that straightaway.

## Stage 2a: Briefing 1

One party takes centre stage and briefs the other about their business, themselves, and anything relevant to the potential relationship. If you can, get the other party to do this in the first briefing. This will mean that, when it's your turn, you can present to whatever they said in their briefing.

Although there will be an element of presentation, it is important that you adopt a coaching approach here, asking open questions to ensure you learn all you need to know. So prepare beforehand.

You will need to ensure they meet all your criteria for a good advocate (see later in this document), or you know why you're happy they don't. Then, in addition to a description of the business, and a brief description of its history, in particular you need to know:

- what is the purpose of their business; what outcomes have they set for it?
- what is their purpose in developing an advocacy relationship with you, and what outcomes do they seek from it?
- who do they know through the business who might be useful to you (not just prospective clients, but people who know prospects)?

You also need to find out more about them:

- what are their personal aspirations?
- what do they like, dislike?
- who do they know outside the business who might be valuable?
- what have they achieved; what are their interests outside work?

Towards the end of this meeting, ask them what their reservations are. Use the notes below to actually prompt them: "If I were you, I might be concerned about X".

Finally, ask if they think it is worth going to the next stage. Only if you both agree it is, should you.

## Stage 2b: Briefing 2

This is your turn to repeat the above.

When it comes to them asking you what your purpose is in developing the advocacy relationship with them, I strongly recommend that you answer – truthfully and with complete integrity and sincerity – that it is to help them. Getting leads, and hence clients, is an outcome of the relationship.

The more you give, the more you will gain in return.

When it comes to the bit about reservations, you should have thought this through and have prepared what your reservations are. If you genuinely believe you have none, give the other person your ten most precious clients and contacts then and there as a token of your complete lack of fear. Any reluctance – whatsoever – at the idea of doing this will be an indicator that you do have reservations. If you can't yet surface them, that's fine, but set an intention that you will before the next meeting.

Finally, explain what the next stage entails. Ask if they think it is worth going to it. Only if you both agree, should you do this.

## Stage 3a: Agreement

Agree how the relationship is going to work.

You'll have discovered in the briefings how many leads each of the parties would like from the other. Now agree how, when and where you'll meet and put the dates of the first three meetings in the diary then and there. I strongly recommend face to face meetings monthly and other contacts (emails, phone calls) weekly. Advocacy relationships wither unless sufficient attention is given to them, particularly in the early stages

Keep checking those reservations, and then positively confirm that the relationship is, indeed, going to go ahead.

## Stage 3b: Referrals

If you both still agree at this point, you will be at the stage where you and the other party are willing to give each other a few leads. If one of you can't do this because they don't know anybody suitable, you should have called off the process some time ago. If one of you can't for some indefinable queasiness, this is the ideal time to explore why. It will be a reservation which hasn't been dealt with, and it needs nailing.

## Stage 3c: Teaching

In this stage each party teaches the other what they want them to say. This will require each person to know to whom they want their advocate to talk in the first place (market sector, size of business, location, etc etc). It will require each party to know which products/services they want their advocate to talk about. (See the handout about briefing the advocate.)

This process could be simple and straightforward, or it may need some mutual work done on it. The other person may feel nervous about talking about your services in detail, in which case you need to work out an approach which obviates that.

## Stage 4: Follow up meetings

These can be looser in format. The purpose is as much to maintain rapport between the parties as anything, though it is essential to keep each other informed of progress with referred contacts, whatever came of them. Of course, simple courtesy demands you don't wait until a monthly meeting before reporting on a discussion with a referred contact, but the follow up meetings are useful for taking a broader overview of the referral process.

And, of course, there may well be factual updates to relay too (new products, new staff, annual results and so on).

## Reservations

Reservations are of course dependent on

- the person holding them
- the other person (or business) in the potential relationship

There are some common themes, however:

(1) Trust. Do you trust them? This can be an entirely emotional assessment, but it is no less valid for that.

(2) Quality of work. Just because X does a good job, how do you know that his/her colleagues do? Are there processes in place to ensure consistency across staff and through time?

(3) Poaching. If an accountant refers her client to a lawyer, how does she know that the lawyer won't entice her client to move to his friend, an accountant?

(4) Time. Do they have time for all this?

(5) In some market sectors confidentiality and (legal) compliance are real concerns.

Make a list of your reservations, and broach them during the briefing meetings. If the above aren't on the list, know why they aren't.

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