


EXPLOIT YOUR STRENGTHS

Awakened from a deep sleep, Mary fumbled through the darkness to stop the incessant ringing of the alarm clock. “Another day, another dollar,” she muttered groggily as she pulled herself out of bed. As she made her way to the kitchen to prepare her breakfast, Mary switched the television on and listened to the news anchors describing the events of the morning.

“And with more on this late-breaking financial story, we turn now to our financial expert,” the anchor said, a sense of urgency in his voice. Wondering what had happened, Mary was glued to the television. The financial expert began to describe what had caused the sharp drop in the stock market the day before. He went on to explain calmly what this news meant to the average investor like her.

Over the years, this expert had become more than just someone reporting the financial news. He had become like a trusted friend to Mary, who always listened carefully to what the financial expert said and benefited from his timely and knowledgeable advice. He’s always able to describe things in a way that really makes sense to me. We need to meet with him, Mary thought.

A few months later Mary finally made that call. She and her husband met with the financial expert, who designed a customized

game plan to help them meet their financial goals. Mary and her husband told the expert that he was just as professional and trustworthy in person as he appeared on television. The expert couldn't help but laugh. Smiling, he remarked, "I hear that a lot lately." Now each time Mary sees their financial advisor on television or reads his quote in a news story, she displays a proud smile. It confirms that she and her husband made the right choice. They are pleased to refer others to the financial expert.

Each day the media seeks out financial services professionals to provide perspective on the day's financial events. Countless people just like Mary are looking for "an expert" to begin working with. There is no better time for financial professionals to establish themselves as the experts people can trust and turn to for timely financial information. Media contacts are searching for someone to help their audiences navigate the difficult financial environment. By consistently following a simple strategy, you can leverage free media exposure to gain visibility, enhance your credibility, and experience greater profitability. You can become the "financial expert" whom the media calls.

DO YOU HAVE WHAT IT TAKES?

Becoming known as an expert is not the same as being a one-shot media event. Instead, in this book you're going to learn the techniques and strategies of how to begin appearing in the media on a regular and frequent basis. And you'll get an up-close and personal look at how to immerse yourself into the media so that it becomes an invaluable part of your everyday business. In fact, you'll begin to wonder how you ever ran your business without utilizing this amazing marketing tool. This book will show you how to build maximum name recognition for yourself and to become the trusted expert in your community.

Being successful in the media takes a full commitment on your part. Think about your own role as a member of the audience or as a consumer. It takes a while for you to begin noticing people in the media, to begin remembering their names and really listening to what they say. Your own involvement in the media is no different—

it is not an overnight solution to raking in business. But, over time, if you stick with it and become good at it, you will reap the rewards.

Being in the media isn't for everyone. If you're not willing to arrive at the studio at the crack of dawn, have your schedule interrupted when a reporter calls, or stay on top of your field on a daily basis, you may want to consider other ways to grow your business. If, however, you realize that achieving anything great takes perseverance, then you have what it takes to experience success as a recognized expert and enjoy the massive exposure that only the media can deliver.

MEDIA ACTION POINTS

- ✓ Success in the media requires a 100 percent commitment on your part.
- ✓ Stay up-to-date in your field. Always know the latest financial news.
- ✓ Now is the time for *you* to be the financial expert!

LOCAL MEDIA RELATIONS CONNECTS ADVERTISING TO SALES

If you watch prime-time television, you're likely to see commercials for several different financial services and insurance companies. Why do they spend so much money on national advertising? To create awareness of their companies in the minds of viewers. These companies run commercials during specific shows because they know that, based on market research, the viewers they want as clients are watching those programs. They want to create positive exposure for their company. However, the problem with advertising is that it's often overlooked as clutter. Many times viewers change the channel or leave the room during commercials. While viewers may remember a certain commercial, product, or company, they don't necessarily feel inspired to go out and buy immediately. When people see a commercial for investments or insurance, in particular, they typically won't run to the phone book and call to set

an appointment right then. The financial services business is a relationship business. People don't buy the commercial; they buy a relationship with a trusted advisor.

How can you capitalize on this national advertising? The answer lies in examining three principles of consumer psychology at work here.

Three Consumer Psychology Principles

Principle 1. Commercials don't trigger immediate financial services sales.

Principle 2. Financial relationships begin at the local level.

Principle 3. Purchasing decisions frequently are based on convenience.

The first principle is that most people don't run to the phone and set an appointment when they see a financial services commercial, just as they don't run out and buy any product or service immediately after seeing a commercial for it. For investment and insurance companies, the primary purpose of commercials is to build ongoing awareness of their products and services, in the hope that one day, when the need arises, viewers will choose to do business with that company.

The second principle is that a relationship with a financial professional is initiated primarily at the local level, where the prospective client lives or works. When it comes to their money, most people like to be able to shake hands and look into the eyes of the person they have hired to help them manage their hard-earned dollars. Ask yourself this question: Would you blindly invest your life savings with someone you've not met personally? Other investors are the same way. They don't want to invest their savings with a stranger. They want a personal relationship with a trusted financial professional. It's the same reason so many people do their banking inside the bank instead of using the drive-through or the ATM. They prefer the personal touch that only face-to-face interaction can provide.

The third principle is that most people purchase goods and services when the process is easy and the location is convenient for them. Many people feel inconvenienced if they have to drive more

than 30 minutes to a financial professional's office. Whether people are going to the dry cleaner's or the doctor's, they don't want to waste a lot of time fighting traffic to get there.

These three principles of consumer psychology point to the fact that the majority of purchasing decisions for financial products are made at the local level. That's why a locally based media relations campaign is so critical if you want to accomplish a huge breakthrough in marketing to your local community. A local media campaign is the doorway that you build so that future clients can walk into your business. It's how you can tap into the power of national advertising and use it to generate tangible sales for you in your local buying area.

Table 1.1 illustrates the thought process of the average investor.

Since investors want to work with financial professionals on the local level, what's the best way for you to capitalize on this opportunity? It depends on whether you are an independent financial professional or are affiliated with a nationally recognized company.

If you are an independent advisor, here's the opportunity for you:

Because of the number of financial commercials people see, it's easy for investors to be confused. Since most companies sound similar, it can be difficult for people to differentiate between them. That's where you come in. Because you must resolve people's confusion, your appearances in the local media become even more critical. For you, the media is a way to differentiate yourself in a very

Table 1.1 How Investors Respond to Advertising

Financial Firm Action	Investor Reaction
National advertising	"Hmmm, another commercial for a financial firm. This is all so confusing. They all sound the same. How can I cut through the clutter?"
Local media	"That advisor explains things in a way that makes sense, and I like his style. Plus, he's in my local area. I'll contact him."
Sales	"This advisor is just as professional and knowledgeable in person as he is in the media. I'll invest with him."

crowded marketplace. Because you don't have the advantage of a company that advertises nationally, you have to be even more thoughtful and creative in generating awareness for yourself and your company.

When you appear in the media, your competitive angle should be: "I'm independent and proud of it. I'm not tied to any one company, so I have an unbiased view of your investment opportunities. I recommend that you work with an independent financial professional."

If your company does national advertising, here's the opportunity you have:

National advertising creates awareness of your company. When you appear in your local media, you are directly connecting your national company to you, the qualified financial expert on the local level. Often a prospect wants to invest with your company but isn't sure whom to contact locally. As you begin appearing in the local media, and as that investor begins to notice you, it's likely that he or she will call you when the need arises. This process directly connects national advertising to tangible sales for you and your company.

When you appear in the media, your competitive angle should be: "I am a financial professional who is associated with a nationally recognized company. I find most investors prefer the security of working with a company with a strong brand name."

Here's the main point: Regardless of how your business is set up, whether you're independent or affiliated with a national company, the key is to make a conscious decision that you are going to be the financial professional of choice in your local buying area. If you market yourself successfully, clients with money will be drawn to you. As you begin to appear in the media, you must realize that the only limitations you have will be those that you place on yourself. It's all about marketing!

BE THE NEWS

As a financial professional, when you appear in the media, you're part of the news, not an advertisement. That's the beauty of putting effective media relations into practice. Plus, a media rela-

tions campaign can be conducted at a fraction of the cost of paid advertising—and is usually more effective. This doesn't mean that a media campaign is destined to make you an immediate profit. The goal of media relations is to build not only name recognition but also trust. With each appearance in the media, you are building credibility in the eyes of your audience, and you are increasing the likelihood that its members will call on you when they need financial advice. You're also distancing yourself further from your competition. At the same time as other financial professionals out there are making unsolicited attempts to reach prospects, those same prospects are seeing and hearing you as the financial expert in the media.

You must place yourself on the offensive and position yourself to begin attracting the clients you want. As a natural consequence of acquiring more new clients, you'll become more profitable and have a lot more fun. Although your results may not be immediate, you'll be sowing the seeds in the minds of your future clients. Over time, those seeds will grow. When a triggering event occurs in their lives that makes them realize that they need a qualified financial professional, you will have positioned yourself to be their natural choice.

THE MEDIA MULTIPLIER

Would you rather have to say the same message 1,000 times, or say it once and have it heard by 1,000 people? It's easy to figure out which is a better use of your time. Consider this for a moment: How long would it take you physically to meet with 1,000 people? If you met with each person for only 30 minutes, for eight hours a day, five days a week, it would take you over three months. Now, that's a daunting task. But if you appear as a guest on television or on a radio newscast, or if you're interviewed in an article for a newspaper or financial web site, you can reach that many people easily in just three to four minutes each time. And truth be told, the numbers typically are far greater than that—sometimes you're reaching tens of thousands or hundreds of thousands of prospective clients with each interview that you do. Media access offers you a huge opportunity to take your message to countless ideal clients at one time.

Marketing research indicates that people need to see a person's name or a company name 8 to 10 times before they begin to recognize and remember it consciously. In the financial services business, often we are taught to use what is referred to as "drip marketing" in order to overcome this problem. Drip marketing can involve mailing or e-mailing to a certain group of prospective clients every month for a year or more, so that you're "dripping" your key marketing messages on them. The goal is that, over time, the recipients of your information will begin to recognize your name and decide to use your services at some point in the future. This same concept works with the media audience. The more often people see or hear your name and company name, the more familiar they become with you. And the more quickly they develop a favorable impression of you and your business.

One of the things I hear from many financial professionals is that they feel they are working too hard for too little money. And not only are they struggling financially, but they feel they're spending too much time away from their families. They feel trapped and they don't know what to do to change it. I have good news for you. It's time for that to change! As you begin to generate more business due to your media appearances, you'll be putting yourself in a position to impact your quality of life significantly. Since the media allows you to market yourself effectively to many people in a short amount of time, you'll begin to find that you're getting more done in much less time than it used to take and you're making more money. You'll be faced with choosing how you want to spend all the extra time you now have.

Effective media coverage gives you two options:

1. Make the same amount of money in less time. Because you're attracting more of the clients you want more quickly, you can choose to keep your income level. But now you have the freedom in your schedule to spend more time with your family or doing what you enjoy.
2. Make more money in the same amount of time. You already have your business engine running on all cylinders. When you add media appearances to your existing marketing plan of attack, you can experience a significant breakthrough in the number of new clients you acquire and the income you bring home.

The choice is yours: Make the same amount of money or make much more money. You get to select which option lets you achieve the quality of life that's best for you. Clearly, the media allow you to convey your message efficiently, in a way that lets you work smarter, not harder.

WHAT ARE YOUR STRENGTHS?

Do you ever wonder why some people always seem to be successful at what they do? It seems as if everything they touch turns to gold. Every day in the business world, there is news of another person achieving great things. Are some people just born lucky? Or is it pure coincidence that some people hit the big time while others feel they're always running out of time?

In my experience, I've found that successful people consistently place themselves in a position to be successful. It's not by accident—it's by design. They may not achieve their goal the first time, or even the second time. But with laser precision, they repeatedly place themselves in a position to reap the rewards they're seeking. So when an opportunity presents itself, there they are, prepared to reach out and seize success for themselves.

How do these people obtain success? By exploiting their strengths. They uncover their unique strengths—what sets them apart and what they excel at—and they capitalize on those strengths. When you consciously place yourself in the media, you are putting yourself in prime position for good things to happen. And not just now, but far into the future. This is the key to success in the media and in your overall business, and this is what you're about to learn.

In order to be successful in the media, you need to discover which aspects of the media you feel most comfortable with. It may be one or two of the media outlets. Or you may be able to handle all the various media outlets with ease. Whatever your situation, typically you'll discover one media outlet that you most enjoy and you feel really showcases your ability to communicate effectively with your target audience. Your personality may be best suited for the television camera. You may have a resounding voice and be drawn to radio. Or you may determine that your ideas are best expressed

in writing. The questions in the media action points box will help you uncover your strengths and reveal the media outlets for which you may be best suited. The purpose of this exercise is twofold.

1. These questions will help you identify the media category that you may enjoy the most.
2. More important, the exercise will help you identify which media categories make you feel most uncomfortable and nervous. Remember, it's better for you not to have appeared in the media at all than to come across shaken and disoriented on the air or to submit a poorly written guest article to your local paper instead of making a strong first impression.

MEDIA ACTION POINTS

To identify your strengths, answer these questions:

- ✓ What tasks do you enjoy most about your current job?
- ✓ What tasks do you least enjoy about your current job?
- ✓ Do you enjoy being in front of people? Why or why not?
- ✓ Do you speak well? How do you know?
- ✓ Do you enjoy writing? Are you good at it?
- ✓ When you need to speak to someone, do you prefer to call, write an e-mail, or see the person face-to-face? Which type of communication are you most confident using?
- ✓ Do you get nervous being in front of people?
- ✓ What would other people say is your strength in communicating?
- ✓ What is your least favorite way to communicate?

Review your answers to these questions and determine which media outlet you find yourself drawn to. If you enjoy communicating face-to-face and in front of people, you may be headed for television. If you communicate best by phone, radio may be a good fit.

And if you prefer to send e-mails to people or to write letters, then the print media may be the path to follow. The key is to focus your media energies where you are most comfortable and have the highest probability of positioning yourself for success. Use this new-found information about yourself to prioritize your media game plan and focus your energies on what you do best.

WHAT IS YOUR COMMUNICATION STYLE?

Another component of positioning yourself to be successful with the media is to appreciate and understand your unique style of communicating. Watch or listen to the national and local news anchors. Each of them has a unique style, from how they speak to the mannerisms they use. As you study them carefully, you'll begin to see how well they paint a picture with their words. The good news is that you can use the same methods they do to be successful in communicating.

In media relations, there are two primary levels of communication, the fundamental and the personal, as shown in Table 1.2.

How well do you communicate on these two levels? Evaluate yourself now, based on what you know about yourself from your experiences in speaking both publicly and informally. Television and radio producers aren't just looking for people to speak about a topic. What they really want is someone who will captivate their viewers and listeners with thought-provoking and timely information.

Table 1.2 Two Forms of Communicating with the Media

LEVEL 1: The Fundamental (Minimum expectations of all speakers)	LEVEL 2: The Personal (Attributes that define the uniqueness of each speaker)
<ul style="list-style-type: none"> • Has knowledge of the topic • Speaks clearly and enunciates well • Conveys confidence 	<ul style="list-style-type: none"> • Effectively varies vocal pitch • Uses mannerisms to emphasize key points • Speaks authoritatively

That's what increases their audience, drives up their ratings, and sells more advertising. When you appear in the media, the key is to emulate, not to imitate. No one wants to see a carbon copy of another guest. So continue to critique your media appearances and work to improve each time. Remember that you are unique. The quickest way for you to experience success in the media is by leveraging your special talents in communicating.

Think of star athletes. On game day, they don't succeed simply by running onto the field with no preparation or strategy. They watch their game films to critique themselves on the good and bad things they've done in the past so they can show significant improvement the next time they compete. Elite athletes take it a step further. They study how other star athletes play their position so they can improve their own performances. They aggressively search for every angle to gain an advantage over their competition. Each time you appear on television or radio, record it so you can go back and analyze your interview "game tape." Have someone else review the tape with you to pick up on even the slightest area for improvement. Let's be honest here. Watching and listening to yourself over and over can be a bit unnerving. But believe me, it is the best way to truly see what the audience sees. As you're getting started, media interviews can be hard to come by, so you need to execute and then study each of your appearances with the intensity of an athlete.

What's the quickest way for you to improve your interview skills? Follow this simple system: Do your first interview, then critique yourself strictly, and then quickly do another interview. As you begin to be interviewed more frequently, continue to implement this system to spot-check your performances. Think of this process as a cram course on media interviewing skills. Save a copy of every interview you do for a newspaper or magazine to see how closely the reporter captured your comments and the key points you were trying to convey. Think back to when you spoke to the reporter. Try to recall exactly what you said when you were answering the questions. Did the reporter quote you accurately, or were your comments taken out of context? Decide now what you'll do differently the next time a reporter calls you for an interview.

Use this checklist when reviewing your television interviews:

TV Interview Critique Checklist

- Did you speak too quickly or too slowly?
- How does your voice sound—smooth and relaxed, or nervous?
- Did you sit up straight, or do you appear to be slouching?
- Do you appear relaxed in your body language?
- Did you smile periodically?
- Did you use the anchor's name as you answered some of the questions?
- Did you appear to know what you were talking about?
- Did you use simple language (not industry jargon) to make your points?
- On a scale of 1 to 10 ("1" being poor, "10" being excellent), how would you rate the interview?
- What would you change for your next interview?

Use this checklist when reviewing your radio interviews:

Radio Interview Critique Checklist

- Did you speak too quickly or too slowly?
- How does your voice sound—smooth and relaxed or nervous?
- Did you smile periodically? (Note: Smiles can be heard in your voice inflection.)
- Did you use the anchor's name as you answered some of the questions?
- Did you sound as if you knew what you were talking about?
- Did you use simple language (not industry jargon) to make your points?
- On a scale of 1 to 10 ("1" being poor, "10" being excellent), how would you rate the interview?
- What would you change for your next interview?

Here's a checklist to review what you were quoted as saying in a newspaper, magazine, or other print media:

Newspaper Interview Critique Checklist

- Did the reporter accurately report your comments?
- Did you sound as if you knew what you were talking about?
- Were your name, title, and company name printed correctly?
- Did you use simple language (not industry jargon) to make your points?
- On a scale of 1 to 10 ("1" being poor, "10" being excellent), how would you rate the interview?
- What would you change for your next interview?

PERFECTING YOUR COMMUNICATION STYLE

The more you work with the media and the more comfortable you become with speaking, the more confident you will become in your abilities. If you appear in the media only sporadically, it can be difficult to improve on each interview because you're not doing it enough—especially if you're being interviewed every few weeks. In order to maintain a level of continuity, it's important to continually practice being interviewed.

The more critically you evaluate your performance, the better your chances of improving the next time. Just as in any sports activity, the more you practice and refine your skills, the better you feel about playing and the better results you start to see. As the saying goes, "Practice makes perfect." Working with the media is the same way. Take it very seriously. Study other people who are being interviewed. Learn from them and implement into your routine what you see them doing well, and you'll begin to see more and more media outlets call on you.

MEDIA ACTION POINTS

- ✓ Each time you appear in the media, carefully critique yourself. Improve on the small details.
- ✓ Focus your attention on speaking clearly.
- ✓ With each interview you do, you will feel more confident.
- ✓ Set a goal of doing a certain number of interviews each month.

CREATE YOUR PLAN FOR SUCCESS

Here are the three key factors to consider in creating your plan for media success:

1. Speak or write on what you know.
2. Focus on the media category that best showcases your strengths.
3. Target the specific media outlets that your ideal client is tuned in to.

Remember this essential rule regarding appearing in the media: Speak or write only on what you know. If a media opportunity comes your way that is not completely in line with your expertise, don't accept. Refer the appearance to someone else who is an expert in that area. Let's face it, you'll be tempted to accept the opportunity. You may tell yourself that you can fake your way through the interview just to get the media exposure. But the potential downside is too great. What if you get asked a question to which you don't know the answer? What would you do? You've seen others have the deer-in-the-headlights look, but now you'll be the one who feels trapped.

The other pitfall to speaking on topics outside your field is that doing so can dilute your effectiveness as a professional. Think of it this way: If you were in need of a delicate medical procedure,

would you rather have the general practitioner or the renowned specialist conduct the surgery? The same holds true in the media. Media outlets always want the best expert they can find. But they don't always know who the expert is. Then you have a shared responsibility. If you are an expert on the topic, take the opportunity and do the interview. If, however, you sense that a media opportunity is outside the scope of your expertise and knowledge, simply say: "My expertise is in topic X, so it's probably best if I don't comment on that. But I know someone who does specialize in that area, and I can refer you." Then give the reporter the name and number of your contact to make it very easy for the media to contact that person. By doing so, you'll enhance your own credibility with the media representatives, and you'll become a key contact for future calls. When the need arises, they'll call you because they know that you'll be honest about whether you are the best person for the interview or whether another expert might be. And what a great position that is to be in—having the media call you with all requests related to finances. You become an interview gatekeeper, choosing which interviews to take and forwarding the others to appreciative professionals.

The second aspect of your plan to experience success in the media is to determine the media category on which you should focus your primary attention. Initially, any media exposure is good media exposure. However, over time, it will be critical to find the media outlet where you are most comfortable. To exploit your strengths fully, you must discover what you enjoy doing and capitalize on it by positioning yourself in the media outlet that best utilizes those strengths.

Table 1.3 provides a list of the major media categories to select from.

Use Table 1.3 to brainstorm the various media channels in your community. Follow these steps:

1. Circle the media category you feel you're best suited for, based on the questions you answered earlier.
2. Review the list of media outlets, and determine which ones may present an opportunity in your area.

Table 1.3 Media Category Matrix

Media Categories	Media Outlets	Local Media Outlets
Television	<ul style="list-style-type: none"> • National news programs • Local news programs • Cable-access news programs 	Bloomberg, CNN, CNBC ABC, NBC, CBS, FOX, UPN, WB affiliates Check your local cable listings
Radio	<ul style="list-style-type: none"> • Nationally syndicated programs • National news programs • Local news programs • Local music stations 	Bloomberg Radio National Public Radio Check your local radio listings
Newspapers/ Magazines	<ul style="list-style-type: none"> • National newspapers • Local newspapers • Local business newspapers • National trade publications • Company/community newsletters 	<i>USA Today, Wall St. Journal</i> <i>Chicago Tribune</i> <i>Crain's NY Business</i> <i>Money, Forbes, Barron's</i> Check with large companies in your local area.
Internet	<ul style="list-style-type: none"> • National financial news pages • Local web content 	MSN.com, CBS Marketwatch.com, cnnmoney.com Check your local media web sites

3. Write down the local media outlets you can contact about becoming a financial source for their stories.

The third part of your marketing plan is to determine which of these channels your ideal prospects are tuning in to. Think back to earlier in the chapter, when you answered the questions about defining who you are. Now let's take that same approach to developing your maximum media relations plan of attack. Think about each of the questions in the Media Action Points box and answer them carefully. All of these questions may not apply to your situation.

MEDIA ACTION POINTS

- ✓ What is the one characteristic that makes you and your business unique?
- ✓ Define your ideal client (age, minimum investment levels, income levels, specific industries, etc.).
- ✓ List three clients you have now who fit in the “ideal” category.
- ✓ How did they become your clients?
- ✓ What media outlets would best reach your ideal clients?
- ✓ Which of your strengths could be leveraged into media activities to attract more people in the “ideal” category?

Many financial professionals I talk with don't have a clear picture of the typical “average” client in their current client database. For this reason, it's helpful to complete a spreadsheet like the one in Table 1.4 to identify the types of clients you are attracting now. Once you evaluate the client data in your situation, you will have tangible information on which to base your marketing decisions. After evaluating the information about your current clients, you may discover that you are reaching exactly the type of clients you want. Or you may determine that the level of clients you are working with is not profitable for you. You further may discover that you need to shift your strategy radically to begin attracting a completely different type of client.

By answering the Media Action Points questions and completing the Ideal Client Profile, you should be able to focus your strengths and develop a marketing plan that will impact and reach your ideal prospects. Once you have a handle on who your ideal prospects are, one of the best ways to determine which media they use is to call each station, newspaper, or magazine and ask for a demographic report of their audience. Then, based on the information in those reports, you can determine which channels are ideal for your message.

The bottom line in creating your media plan is to find what you absolutely enjoy and then work it to perfection. By doing so, you'll

your media exposure is critical to achieving a breakthrough for your business.

In sales, the goal is to generate the most revenue and grow the company's market share to number one. In effective media relations, the purpose is to build "mind share" among prospective clients and become their number-one choice for a financial professional. Building mind share is about creating and nurturing positive messages about you and your company in prospective clients' minds, messages that will lead them to buy from you in the future.

No longer should you be satisfied with a shotgun approach to marketing that claims that any marketing is good marketing. That idea is absolutely false. Remember this key point: The most successful people and businesses capture the minds and hearts of their customers with a powerful, authentic message. They repeat the same key messages over and over again until their ideal clients can't help but notice them and accept them. Once you've captured your prospective customers in this way, they will consider themselves to be your clients *before* they actually buy from you. This is an intriguing phenomenon. As you appear in the media on a regular basis, your name will become so embedded in your prospects' minds that as soon as they feel the need for your product or service, they will not even think of calling anyone but you. That is the result of maximizing the media.

Let me share with you a personal story. I appear in my local media on a weekly basis. Here is what I have found to be one of the keys to achieving success and attracting my ideal clients: I work to convey an authentic message and do it on a consistent basis. Prospective clients who call my office to schedule an appointment frequently tell me and my staff that they appreciate my down-to-earth approach and feel like they already know me. When I started my work in the media and this first began to happen, I didn't think much about it. However, over time, I began to see a pattern unfolding. People would see me on television. Then they would call to set up an appointment to discuss handling their investments and insurance. In most cases, their accounts were quite sizable, and they fit my ideal client profile. It was becoming that simple.

I realized that the media was a powerful tool I could use to reach my ideal clients and achieve my income and business goals. But more important, I discovered that the tremendous media expo-

sure I was getting allowed me to “presell” myself before prospective clients even walked in my door. These ideal clients had already decided to work with me before they came into my office. All that was left was for me to do was to decide if I wanted to take them on as clients. However, the more I thought about this amazing concept, I realized that I had been leaving the results of my media exposure to total chance. I was doing interviews that got my name in the paper or my face on television, but I wasn’t harnessing fully the vast power of this incredible marketing machine. From that point on, I went on the offensive and began to take control of my marketing destiny. I began selecting topics for my interviews that would hone in on my ideal clients like a laser beam and cause even more of them to contact me to set up an appointment. When newspapers called me, I began incorporating phrases into my answers that would grab the interest of a preretired or retired investor (my target market).

By implementing the strategies in this book, you too can experience the joy of having your ideal clients choose to work with you even before they even arrive at your office. You’ll have them asking *you* to work with them!

This is the idea behind the “Maximizing the Media” continuum shown in Figure 1.1.

The first section of the graph represents people who become *aware* of your message for the first time. The middle section represents the people who have heard and seen your message enough to

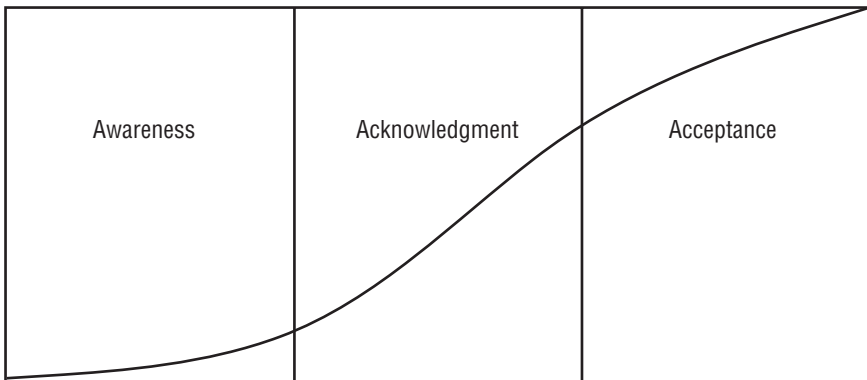


Figure 1.1 Media Marketing Continuum

at least *acknowledge* that they've seen or heard you before. On the far right are the people who have seen or heard you so many times, they not only recognize you but also completely *accept* what you are saying. Remember, these people have not done any business with you yet. But because they have heard and seen you so much in the media, they *will* do business with you when the need arises. Interestingly enough, when potential clients are in the far right end of the "Maximizing the Media" continuum, in their minds they actually consider you to be the one from whom they are already buying—even before they have purchased any financial products from you. When this happens, you have succeeded in your goal of building mind share with these prospective clients.

MEDIA ACTION POINTS

Answer these questions to help determine where you think you and your company are on the "Maximizing the Media" continuum.

- ✓ When prospective clients come into your office, do they tell you that they see or hear you in the media?
- ✓ Are prospective clients prepared to begin working with you now, or are they just shopping around?
- ✓ Do you spend a lot of time convincing prospective clients to work with you?

As you appear in the media more often, you will be regarded as a financial expert. It's been proven in my case and for countless financial professionals across the country who are using this program. If prospective clients are not coming into your office ready to work with you, that is a clear sign that they have no "awareness" of who you are. Therefore, you must spend additional time attempting to prove your credibility and trying to "sell" them on working with you. Candidly speaking, when a new client relationship begins this way, it is often a foreshadowing of negative consequences to come. However, on the flip side, if prospective clients come into your office and tell you that they enjoy seeing you in the media and that they hope you can help them, it's a clear indication that they have

accepted you as their financial professional. This is the place on the “Maximizing the Media” continuum that you should aspire to.

Place an “x” on the continuum in Figure 1.1 where you feel people’s perception is of you and your company right now. Use this as a starting point for where to begin your media initiatives.

I realize that each person reading this book is at a different point in terms of experience with the media. You may have been interviewed many times, or you may have purchased this book so you could start your media journey and begin tapping in to the many benefits that media exposure can provide you. Whatever your experience, the key is to draw a line in the sand right now that signifies a new starting point in your media initiatives and in how you market yourself and your business. That line means that you will not pat yourself on the back for just having read this book. Instead, you will commit to implement these strategies for success. Will you accept the challenge?

30 Days to Creating a Marketing Mentality

Read this statement aloud every day for 30 days so it becomes a habit and a new way of positive business thinking for you.

Today I choose to take control of how I market myself. It is my daily responsibility to seek out new and exciting opportunities to create massive exposure for me and my business. I am confident and knowledgeable, and there is no better financial professional for ideal clients to work with than me. The only limitations I face are the ones I imagine in my own mind. Today I will be brave and courageous and step outside of the comfort zone that has held me captive for too long. Today I choose to be successful and accomplish great things.

Truly harnessing your energies in the media requires you to believe firmly that marketing is 100% your responsibility. No one can do it for you. And no one can have the same passion about your marketing than you. Remember: To maximize the media, you must exploit your strengths. Maximum marketing is about generating *high-impact exposure* for you and your company with *low-impact effort*. Media outlets allow you to multiply yourself and your message.

As you're establishing yourself in the media, you must ensure that what you're doing genuinely reflects who you are and creates an accurate image of that genuine self. There is nothing worse than creating an image of yourself that is not you, just for the sake of making money. You don't want to become known as the sleazy "used car pitchman" of your profession. When you're meeting with new clients and they mention they saw you on television or that they see you in the newspaper all the time, the person they see in the media should be the same person they are talking to. You must come across as the same knowledgeable, trustworthy, and down-to-earth person when they meet you in your office. This helps to further cement in their minds that they are making a good decision to begin working with you.

RECOGNIZE THE STRENGTH OF THE MEDIA

Remember, your media relationship is a two-way street. Always focus on giving your media contacts what they want, when they want it. Then you'll get exactly what you want: more new clients, more money, and the steady stream of business you've always wanted. When you appear in the media, you are being placed before their vast audience with an implied endorsement of your credentials and ability. The outlets have selected you because they believe you possess the information and the skills to communicate effectively with their audience. When your media contacts say "jump," you need to ask "how high?" and then jump even higher. Remember, it's not about your needs. It's always about the media outlets' needs. Realize that, and you will have the opportunity to be wildly successful. Your exposure (and, ultimately, the additional clients that you'll receive) is secondary to the media outlets getting what they want.

As you become more and more media savvy, and as people begin to comment on your interviews, constantly remind yourself where your media opportunities have come from and nurture those relationships. Never bite the hand that feeds you. And always try to avoid saying "no" to a media opportunity. Often media outlets operate on a last-minute, interrupted schedule, and they expect for you to do the same by putting their needs above yours. Being a team

player with the media is well worth the work. Always have the attitude that your media opportunities are a gift—and a gift that the media reserve the right to exchange at any moment. Always give them your very best.

Realistically, you'll rarely have to drop everything to do an interview. But starting today, you must be comfortable with the fact that for you truly to leverage the media to help you achieve your goals, you must place the work you do in the media as a top priority. Let me shoot straight with you. As you begin to appear in the media more frequently, there will be times when a television or newspaper interview may interfere with your schedule. The bad news is that you may have to reschedule a client appointment, cause a client to wait a little longer in your lobby, wake up early to get to the news station, or otherwise disrupt your schedule. But the good news is that for all this "inconvenience" on your part, you are having the opportunity to experience powerful marketing exposure that other financial professionals only dream about. Plus, the media will remember your commitment to them. And that means more appearances and interviews for you!

EVERY INTERVIEW IS A FIRST IMPRESSION

Do you remember when you went on your first job interview? You looked your best, you said the right things, and your goal was to make a positive, lasting impression so you would be the one who got the job offer. It's the same way with the media. What's the best way to be successful in the media? Treat each interview you do as the only interview you'll ever do. You want that media outlet to hire you again and to be in front of its audience again. Always approach each interview with a mind-set for success. As they say in sports, "It's time for you to put your game face on." When a reporter calls you and begins asking you questions for the newspaper article she is writing, focus intently on the phone call and then give insightful answers that she will want to print. When a news anchor asks for your analysis on a financial issue, give an answer with unwavering focus and thoughtfulness. Put everything else in your mind aside and devote all your attention to the media.

With every interview you do, that particular media outlet's producers and editors are forming opinions about whether to invite you back to appear before their vast audience. Just like a coach watching game film, they're assessing how well you break down complex financial topics into easy-to-understand ideas. They're evaluating whether you are helping them get better or worse. More important, they're reviewing your information and approach to ensure it is providing a real service to their audience. Just as you did in your very first job interview, put yourself in the position where the media producers and editors want to "hire" you every day to deliver value to their audiences.

TREAT THE MEDIA LIKE A BUSINESS

Do some quick research into how Fortune 500 companies are run across the country, and you'll find that each corporation has specific goals it wants to accomplish each year. Typically those goals include increasing sales and revenue, growing market share, cutting costs, and becoming more efficient and effective. Media outlets operate in the exact same way. First and foremost, they are businesses—and fiercely competitive businesses at that. Throughout the year, each media outlet is ranked by its respective audience. During these ratings periods, television and radio stations fight tooth and nail to come out on top and be crowned the champion with the most market share. The media outlets that earn the highest numbers then can translate those numbers into higher advertising revenues, more viewers, and bragging rights. These are the most critical times of the year for all media outlets. For this reason, at these times the media outlets focus on bringing in guests they know will cause their audience to watch or listen.

Every time that you appear in the media, you're doing much more than just a simple interview. You're making a conscious decision to move forward or backward in your media career. And you're proving again and again to that media outlet that you are its best choice for a financial expert. Let me give you an example. When you're self-employed, it's up to you to hire the best possible people to help you run your company and accomplish your goals. In many cases, it's only after you've actually hired people that you really be-

gin to find out about their work ethic and how productive they are. Over time, you'll find that employees exhibit one of two mind-sets: Either they think like a business owner or they think like an employee. Table 1.5 contrasts the attitudes of these types of employees.

When you work with the media, it's vital for you to exhibit a business owner mentality. With each interview that you do, your mind-set should be that what you say and do is absolutely critical to the long-term success of that particular media outlet. By intentionally having this mind-set, you will be more focused and effective in each interview. Personally, I approach all the media work I do with the seriousness and focus of a full-time job. When I walk through the doors of the television station to do my segment, I recognize that I no longer work for myself. Rather, I know that my boss at that moment is the station manager, my producer, my director, and the intern who is helping write my interview questions. And my sole purpose at that moment is to deliver financial information to viewers in a way that captures their attention and provides them with tangible assistance so they can make better financial decisions. My mind-set is that I am personally responsible for the success of this station and that I am going to do what I can to make my interview the best it possibly can be.

Having an employee mind-set can bring a promising future in the media to a screeching halt. I've done hundreds of interviews. And in that time, I have had the opportunity to meet many famous people who were also being interviewed. They've ranged from movie stars and sports figures to business leaders. It's interesting to get to meet them and visit with them for a few minutes. I have discovered that many of these "stars" expect the media to wait on them hand and foot.

Table 1.5 Inside the Mind of the Business Owner

Business Owner Mentality	Employee Mentality
<ul style="list-style-type: none"> • "I own it." • "It's up to me to make a difference." • "The work I do is critical to helping this company reach its goals." • "What can I do for the company?" 	<ul style="list-style-type: none"> • "I just do what I am told." • "I just want to get through the day. Is it five o'clock yet?" • "The work I do is 'busy work.' Who really cares about it?" • "What can the company do for me?"

As a matter of fact, I often hear producers complaining about how demanding and “high-maintenance” some of these guests can be. These stars get invited to appear because the public is fascinated with them, and their appearances boost station ratings. But from what producers tell me, if it were up to them, they wouldn’t invite many of these famous people back because of how difficult they are to work with. However, I was pleasantly surprised one day when I arrived at the TV studio for an interview. There sat sales guru and world-renowned motivational speaker Zig Ziglar, patiently waiting to go on the set for his interview. He had arrived early and spent a lot of time visiting with us in the waiting room. But what stood out the most to me was what the producers said about him after he left. They all commented on how nice he was and how enjoyable he was to work with. Zig Ziglar exemplified how to work perfectly with the media. Now, that’s the way to get invited back happily! By giving the media outlets what they want, you can easily get what you want. Approach the media with the attitude that you are a team player and you want to contribute to the well-being of the organization. Doing so will help put you on the track to being invited back time and time again.

USE YOUR INTERNAL CLOCK

Each of us has a different time of day when we’re most productive and effective—and when we’re at our best. Some people like to get to the office early in the morning and start cranking out the work. They’re highly focused, alert, and pride themselves on getting a lot done before most people even arrive at work. But there are many people who would like to rip the word “morning” right off the pages of their planners. At about the time the early risers are tiring, these night owls are just coming to life. These people are highly productive later in the day and are able to accomplish their key tasks late into the evening.

Remember this important point: Don’t fight your internal clock. Instead, use it to your advantage. Examine yourself and determine when your best time of the day is and then structure your media time (and the rest of your schedule, for that matter) to capitalize on the time of day when you are most productive. This point is critical: If you’re a morning person, target the morning news broadcasts or try to talk to reporters during the early part of the

day. If you come to life in the afternoon or evening, focus your energies on media opportunities that occur late in the day. Personally, I'm a morning person. That's when I'm at my best. I try to get into the office early and hit the ground running. I'm able to be focused and alert at that time of the day. So it makes sense for me to focus my media efforts in the morning.

MEDIA ACTION POINTS

Here are three steps to leveraging your internal clock:

1. Evaluate yourself and determine when you're most productive.
2. Look at your calendar. See if client meetings or high-level business-building activities have fallen outside the time you're most highly productive.
3. Restructure your weekly calendar. Schedule your most profitable and important activities to fall inside your peak productivity time. That's when you're most likely to experience the greatest level of success.

Capitalizing on your internal clock is perhaps the most important aspect of playing to your strengths. Treat your body clock as your ally and not your enemy. Take full advantage of it and design your workweek so that you are doing the most dollar-productive activity when you're at your best.

Now, let's put this in perspective. There's a big difference between scheduled media appearances and those times when the media call you because of breaking financial news. Remember, to be successful in working with the media, you have to be flexible. As we discussed earlier, think of media coverage as a gift. Always respect that gift as if it were a rare, precious jewel. Your goal is to try to control as much of your media time as possible by scheduling it when you're at your best. However, when the media call, day or night, and they need you to comment on something for a news story or drive to the television or radio station to be interviewed, make every effort to drop what you're doing and go. By doing so, you'll reap the rewards for a long time to come.

PUT YOUR MEDIA GOALS IN YOUR CALENDAR

You've now identified your key strengths and the time of day when you're most productive and effective. It's time to begin setting some tangible, achievable media goals for yourself. I can hear you saying to yourself that you know all about goals. I'm sure you do, but how many of your goals have you actually achieved, and how many have gone unrealized? I'm going to show you how to increase significantly the probability that you'll achieve not only your media goals, but also your overall income and business goals. How? By reinforcing your goals through establishing a fixed weekly calendar, with "media follow-up time" blocked out in that calendar so you can't miss it. It's critical for you to set aside planned time each week to focus on your media efforts. Think of your media relationships as a beautiful garden. The garden must be fed, watered, and tended to on a regular basis.

So it is with breaking into the media. If you are going to be successful, you must make the activity of seeking media exposure a weekly habit. You need to make it a top priority for growing your business. The same theory that it takes 8 to 10 times for a person to begin to pay attention to something holds true for getting media attention. As you dedicate time to reaching your media contacts consistently and to creating the interview opportunities that I'll describe in later chapters, you'll begin seeing progress.

The best way to incorporate this media time into your schedule is to make a weekly fixed calendar, in which you attempt to repeat the same things at the same times each week. Examine what is working in your weekly calendar and what has been producing results for you. Then try to replicate those same activities week in and week out to create a predictable success pattern. The concept is simple: Keep doing the activities that are generating the results you want at the exact same times each week. By doing this, you don't have to keep reinventing the wheel—you don't have to rethink ways to create the same successful results you've experienced in the past. Then you can evaluate which actions are not generating positive outcomes for you.

Table 1.6 presents a sample fixed calendar.

Table 1.6 Weekly Fixed Calendar Template

Date: _____

Time	Monday	Tuesday	Wednesday	Thursday	Friday		
8:00 8:30	Client appt:	Media follow-up time	Home with family	Out	Appt:		
9:00 9:30	Client appt:			Client Appt:	Client calls		
10:00 10:30	TV appearance			Client appt:	Client appt:	TV appearance	
11:00 11:30	Client appt:			Client appt:	Client appt:	Lunch	
12:00 12:30	Lunch			Lunch	Client appt:	Client appt:	Set weekly goals
1:00	Weekly planning				Client appt:		
1:30 2:00	Client appt:			Client follow-up	Client follow-up	Client follow-up	Client follow-up
2:30 3:00	Client appt:	Client appt:	Client appt:	Client appt:	Client appt:		
3:30 4:00	Client appt:	Client appt:	Client appt:	Client appt:	Client appt:		
4:30	Staff meeting	Staff meeting	Staff meeting	Staff meeting	Staff meeting		
5:00	Leave office	Leave office	Leave office	Leave office	Leave office		

Typical fixed calendar items are the critical tasks: phone calling, prospecting, client service, marketing, and the like. In addition to those key items, add “media follow-up time” to your calendar. This is the time you’ll spend each week thinking of new ideas for your media appearances and pursuing more media opportunities. Also add to your fixed calendar client appointments each week, projects, and to-do items. This fixed calendar template can be re-created in any spreadsheet program.

PUT A SPENDING LIMIT ON YOUR TIME

Let me share with you a secret to increase your productivity significantly every day. Put time limits on everything you do. I talk with advisors all the time who tell me they plan on a client meeting lasting 30 minutes and it drags into 2 hours. Or they know, at the end of the day, that they’ve shuffled some papers around their desks, but they can’t quite say that they truly accomplished anything significant that helped grow their businesses. No doubt, you’ve been the victim of such “time theft,” and you’ve wondered where the time went and why you didn’t get anything done. The key is for you to take control and begin to *own* your time. Treat it like a rare commodity.

As you fill in your weekly meetings and to-dos in your calendar, block out a fixed amount of time for each item. If you’re going to meet with a client, decide ahead of time how long the meeting will last. When you go to the doctor’s office, does she spend two hours with you? If she did, you might begin to wonder why she doesn’t have other patients to see or why she’s not busier. Don’t let your clients think those things about you. People expect their financial expert to be very busy and to have a limited and structured amount of time in which to meet with clients.

Schedule 30-minute or 1-hour appointments with your clients. If you can’t accomplish your goals in that much time, you should re-think how you’re running your appointments. If your appointment is running long, simply say, “Well, we’ve accomplished a lot today. Let’s go ahead and stop here.” Then if you need to, meet with the client again the following week. This benefits you and the client because you’re accomplishing more in less time. If you need to do

some work for a client (run an investment report, design an insurance illustration, etc.), give yourself a fixed amount of time to accomplish the task. Doing so will cause you to be more focused and deliberate in getting the job done.

Financial professionals who have implemented this fixed calendar system tell me that their days now are filled with significant accomplishments. They leave the office each day feeling as if they made tangible progress toward their business goals. Working with this sense of urgency will allow you to run your client appointments more effectively and get your projects and to-do items accomplished in short order. The key is to custom-tailor your schedule based on your productivity pattern.

MEDIA ACTION POINTS

- ✓ Determine what time of day you are most productive.
- ✓ Fill in your key weekly tasks on your fixed calendar.
- ✓ Block out two hours per week (when you're at your best) for "media follow-up time."
- ✓ Schedule your time in fixed increments.
- ✓ Work with a sense of urgency.
- ✓ Put time limits on everything you do.

SET GOALS THAT STRETCH YOU

If you aren't setting goals and checking your progress often, the busyness of your daily life can overwhelm you. Each day will blend into the next until 10 or 20 years go by and you are left to wonder what you've accomplished. Write down your goals and put them in a place where you can look at them everyday—on the bathroom mirror, in your office, or by your bed. With the fast pace of life, it's very easy to forget what is not in front of you, demanding your attention. Make it a point to review your goals daily; doing so will give you more incentive to accomplish daily the key tasks that you need to do to help you get there.

Here's the easiest way to develop an action plan: Break down your yearly media goals into monthly goals, then weekly goals, then daily goals. For example, you may write that you want to appear on television at least once per month this year or write a guest article for the newspaper two times during the year. The simple action of setting goals and writing them down is powerful. Remember, setting goals doesn't guarantee you'll accomplish everything. But it allows you to make significant progress toward accomplishing what you would not have achieved if you didn't set the goals. Think of yourself as a rubber band and your goals as the fingers stretching you. The bigger the media goals you set, the more you'll be pulled. When your time frame for accomplishing the goal is over, whether you've hit it or not, you won't go back to your original shape because you've been stretched. And the next time you set a goal, you'll be that much closer to achieving it. Simply review your media goals once a week to keep them fresh in your mind.

MEDIA ACTION POINTS

Answer these questions to set your goals:

- ✓ What do you want to accomplish over the next 12 months in your business?
- ✓ What do you want to accomplish over the next 12 months in the media?
- ✓ What do you want to accomplish in 5 years in your business life?
- ✓ What do you want to accomplish in 5 years in your media plan?
- ✓ What do you want to accomplish in 10 years in your business life?
- ✓ What do you want to accomplish in 10 years in your media plan?

Take your goals seriously. The key to most people's success is related directly to goals they set for themselves. If you think big, then set big goals, and you will achieve big things with your me-

dia relations efforts. As Theodore Roosevelt so eloquently stated in 1910:

It is not the critic who counts: not the man who points out how the strong man stumbles or where the doer of deeds could have done better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood, who strives valiantly, who errs and comes up short again and again, because there is no effort without error or shortcoming, but who knows the great enthusiasms, the great devotions, who spends himself for a worthy cause; who, at the best, knows, in the end, the triumph of high achievement, and who, at the worst, if he fails, at least he fails while daring greatly, so that his place shall never be with those cold and timid souls who knew neither victory nor defeat.

Setting big goals for yourself today is the first step toward achieving long-term media success. Taking action to reach those goals will put you on the path to a magical marketing adventure.

CHALLENGE

As you discover your unique strengths and who your ideal clients are, you'll be taking the first steps toward creating your own special identity that will begin to revolutionize the way you think about marketing. Let the realization of your special talents and what you truly enjoy doing serve as the wind behind your back to push you to new heights in how you think about and run your business. If you implement the simple steps in this chapter and the chapters that follow, each and every day, you will move closer to your goal of becoming the recognized financial expert you always dreamed you could be. It's now within reach. With each chapter you complete, I challenge you to take action. Your media success story begins today. Read on and prepare for your next breakthrough.

