Marketing and Selling

LEGACY
Leadership

Marketing and Selling Legacy Leadership®

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If you would like further information about the Legacy Leadership® Program and other CoachWorks® services and products, please contact us at www.CoachWorks.com (info@CoachWorks.com)

CoachWorks® International
The LEGACY Leader Company

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Limitless Leadership
PARTNERING FOR WHOLE LEADERSHIP

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Introduction

Ready, Aim, Market

The purpose of this combination manual/work book is to provide a process, guidelines, tips and resources to assist you in the successful marketing of Legacy Leadership® in a variety of applications and venues. It is built from the experience of those who have been actively and experimentally marketing programs and services generally, and Legacy Leadership® specifically, trying and testing the success of various media and communication strategies.

It will also provide an opportunity to further integrate the ***Best Practices*** of Legacy Leadership® by applying them to the marketing/sales process.

The objective of this workbook is to address:

R.A.M.

Readiness – yours and your potential clients
Aim – who you are marketing/selling to
Marketing – the what, when and how

Begin with the Basics

The common denominator in marketing books and other information is that there are 5 P's to consider: **Product, Position, Place, Price and Promotion**. The most important addition to these P's is **Partnership** due to the pivotal nature of relationships in the Legacy Model.

You will need both a **Business and a Marketing Plan** for successfully developing your business – first a Business Plan, then a Marketing Plan. A well defined Marketing Plan, as part of your strategy, will provide you with a structure to calibrate the milestones and measurables of your Business Plan.

Pertinent P's

- **PRODUCT**
- **POSITION**
- **PLACE**
- **PRICE**
- **PROMOTION**

And

- **PARTNERSHIP**

The Pertinent P's

Product

An increasingly wide and diverse variety of Legacy Leadership® Products are now available, with more in development, to serve the needs of Legacy Leaders from business leaders to children. Legacy Leadership® can now be delivered in formats from "in-room groups" to telephone, and in time frames from one day to one year.

Products include the following formats and offerings – what services do we have to sell? Look at this brief list. What more can you think of? What would be appropriate for YOU to offer your clients? How can these be tailored to your clients' specific needs?

- Level 1— Legacy Leadership® Institute
- Level 2— Facilitator Certification
- Customized Delivery for the Corporate Environment (including One Day Executive Summary)
- LLI TeleClass (26 sessions)
- Legacy for Kids
- Legacy Leadership® for Education Systems, (including Superintendents, Teachers and Students both elementary and high school levels)
- Faith-Based LL

Product Knowledge
The best implicit marketing and sales strategy is to get Legacy Leadership® "into your bones." So, it will be important for you to continue learning long after your Legacy Leadership® Institute experience. This way you will BE conducting your business as a Legacy Leader®. People and organizations will be able to see it and feel it. When in conversation you will be able to make easy and natural connections to, and links between, the ***Best Practices*** in your questions and responses to client needs.

Position/Positioning

Who wants Legacy Leadership® and why? You will answer this question by clearly identifying the total market, niche markets, your business, and the links among all these. There will be an opportunity to learn about assessment resources such as Comparison Charts and readiness indicators.

Making these identifications and then developing your strategy around them is how you will reach your business and marketing goals.

We will look at Positioning through the lens of "readiness" for Legacy Leadership®, and provide a brief discussion of how, why and when people make choices (and act on them). This will support the rule of thumb that the only people/organizations actually attracted to Legacy Leadership® are those who, in some way, are already practicing it, in their lives and businesses. These models, and some understanding of other buying influences, will help you "Qualify, qualify, qualify!"

Positioning Tools

Adoption Influences

There are various tools and models which are helpful for developing strategy in marketing. One is having an understanding of what in, marketing, is known as the "adoption process." This is involves the phases, or series of stages, that a buyer will go through in his or her decision-making process. These include awareness, interest, evaluation, trial and then rejection or adoption of any given product. There are also factors that influence the "rate of adoption" of any new product. These would include compatibility, simplicity/complexity, communicability and the relative advantages.

Adoption Sequence

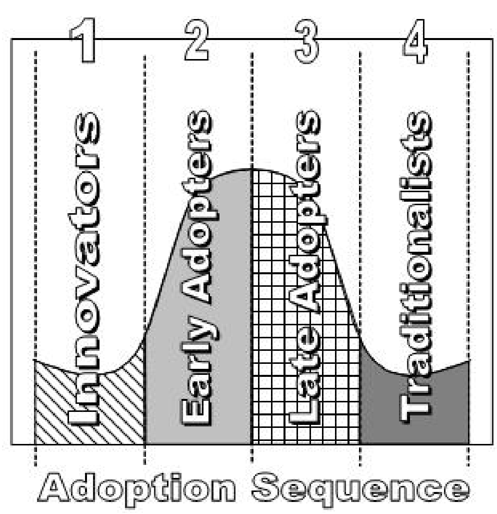
The adoption sequence is one guide for assessing readiness for Legacy Leadership® as a time-appropriate skill building tool. There are four segments in the Adoption Sequence on a bell curve:

Phase 1: Innovators
The characteristics of people in this segment are: they are risk-takers, pioneers, love anything new and need only a little information and very little proof before they are willing to try a new product. On the other hand, by their very inclination to stay on the edge, they are not loyal to a product or company necessarily.

Phase 2: Early Adopters
This group includes those who are willing to consider using a product only after it has been in the marketplace for 1-2 years and there is some evidence to support that it is of value.

Phase 3: Late Adopters
These folks are generally not willing to look at a product until it has been in the marketplace for several years – maybe five, or better. The product must be well-tested, well proven and being actively used in many "credible" environments.

Phase 4: Traditionalists
This group generally relies on "tried and true" products and are generally not willing to gamble on anything that has not been around for many years. It's likely there would be textbooks on it!



Product Life Cycle

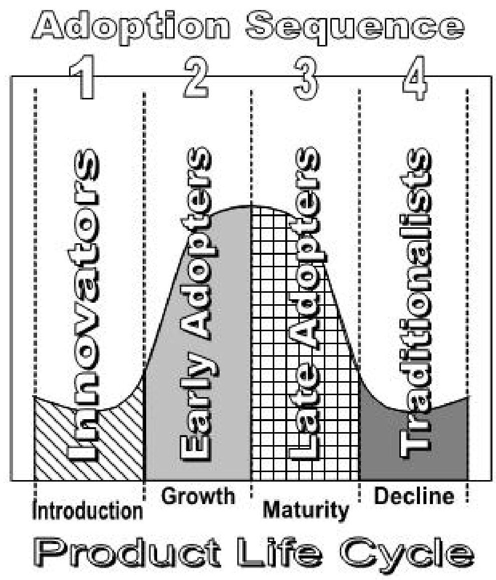
Product Life Cycle is a concept that makes an analogy between the human life span and a product's life cycle. It suggests that typically a product's life is made up of four stages:

Phase 1: Introduction
New, unknown and untried, untested, unproven. There is a need to educate the market regarding value at this stage. If using the VALS™ system, this phase would appeal only to innovators *(SEE NOTE BELOW)*.

Phase 2: Growth
Market awareness increases, some success in the marketplace can be shown, and brand recognition begins to take hold. This phase appeals to innovators and early adopters.

Phase 3: Maturity
The product has been accepted by a broader market, is tested and proven, and appeals to late adopters.

Phase 4: Decline
The product is seen as "outdated" and has been replaced by more evolved products of its type and yet is still "tried and true." This phase appeals to traditionalists.



The adoption Sequence and the Product Life Cycle can be overlaid to show interesting trends in product adoption relative to life cycle.

Neither of the last two product stages or markets apply to Legacy Leadership®. Legacy Leadership® is in its Introduction phase moving into the very early stages of the Growth phase. Also, even as Legacy Leadership® matures, it is considered a "classic" model, with timeless truths that do not change. It is adaptable to any situation, and will always be a "leading edge" model. In addition, CoachWorks® is constantly introducing new products and applications which keeps Legacy Leadership® in the "growth" and "maturity" cycles.

VALS™

Another is a system called VALS™. *"VALS™ is a marketing and consulting tool that helps businesses worldwide develop and execute more effective strategies. The system identifies current and future opportunities by segmenting the consumer marketplace on the basis of the personality traits that drive consumer behavior."* (from the SRI Consulting Business Intelligence website. For more information about VALS™ go to http://www.sric-bi.com/VALS/)

Place: Our Place or Yours?

Public Legacy Leadership® Institutes
The choice of venue is vitally important for several reasons:

- As an attraction
- To highlight and be consistent with the high quality of the Institute and Legacy Leadership® products and materials
- An opportunity to demonstrate innovative collaboration with venues which model the spirit of Legacy Leadership® (this can be used actively in the marketing process)

If marketing to a non-local market, it is wise to choose a central location, close to shops, restaurants, workout facilities etc. This serves to demonstrate consideration for the care and development of the “whole leader!”

Custom Designed Organizational programs
Be well prepared with knowledge of group and logistical requirements so that you can work with an in-house liaison either in their company facilities or at an off-site location.

These considerations will include:

- Ideal group size (between 6 and 30)
- Room size and set up (to accommodate rounds of 4-6) with ample room to move about and lots of wall space for posting flip chart work
- Space and tables for displaying resource material and Legacy props
- Space and tables for refreshments
- If on-site, a hotel close by for out of town participants
- If off-site, choose a hotel so that out of town participants can have maximum convenience.

The more “full service” you can be, the more attractive the total program/coaching offer will look.

Price

The prices of Legacy Leadership® products are set by CoachWorks®. The pricing for programs done by Level 2 and Level 3 facilitators will be set by you. However, CoachWorks® does have a recommended pricing structure and we highly suggest adhering to this. Savings can be offered for early registration in public offerings. *(This also creates an opportunity for multiple communications with potential participants.)*

Holding the Value
In this way you model holding the value of what you, together with CoachWorks®, are offering. You can create special rates for non-profits, churches, youth etc. It is a good idea to have these prices set before marketing and to be transparent and consistent in your pricing.

Price Perception and Influence
It is very important generally, and for Legacy Leadership® specifically, not to use low price as an attractor. The price always speaks to the value offered. It is widely known from market research that, in a list of buying influences affecting consumer decisions, price is actually around # 9 (depending on the variables being considered), though it is often one of the first things people ask about and hold up as a 'gating factor'. Avoid the trap of getting embroiled in this conversation and look for the real reasons for why the person, or organization, is questioning value.

> **Social Marketing**
> "...differing from other areas of marketing only with respect to the objectives of the marketer and his or her organization. Social marketing seeks to influence social behaviours not to benefit the marketer, but to benefit the target audience and the general society."
> *Kotler and Andreasen*

Also, if you want to compare oranges with oranges, check out the prices of competitors' programs and certifications – including territory restrictions. This is an opportunity to "stand in the value" of the high quality and unparalleled offerings of Legacy Leadership®.

The consistency of pricing and presentation will also act as a quality control measure over time as we, the Legacy Community, practice "leaders developing leaders" in a reliable and measurable way.

Promotion
Promotion is about the ways we conduct (or send) information about Legacy Leadership® into our marketplace. This includes all the various media (materials and methods) and how we use them to communicate our offerings. *(See Section 4, and Appendix for examples of available marketing materials.)*

Partnership
This is a vital part of marketing Legacy Leadership®. It includes a variety of innovative, collaborative partnership possibilities which will be covered in greater detail. *(See Section 3)*

Section 1: Your Marketing Identity

WHO are You Marketing AS?
WHERE are you marketing FROM?

Your marketing identify is the basic structure from which you will determine your entire marketing strategy. It is imperative to have a good internal knowledge of what may seem like simple issues and details about your business. Unless you have this clearly defined, you will not be able to plan successful business marketing strategies.

Take some time to think through the following questions and answer them honestly and carefully—even if you think you KNOW all this already!

YOUR BUSINESS

1. What business are you in? (define as succinctly as possible)

2. What is unique about your product or service (as compared to others who may offer similar products and/or services)

3. List and describe your business offerings. Are they clear and well-defined? If not, spend some time here to be sure they are, and be sure YOU know how to identify and define them for others.

(continued on next page…)

Section 1: Your Marketing Identity *(continued)*

4. Is your business currently healthy and growing? Explain. If not, what can you do about it?

5. How will Legacy Leadership® enrich and enhance your service/product offerings?

6. How will you modify your current business plan to include Legacy Leadership®? How can you "weave in" Legacy Leadership®?

7. Is your business local, regional, national, or international? Explain. Include demographics if possible.

YOU

1. How do you primarily describe yourself (a coach, facilitator, consultant, other?)

2. What are your credentials to support this claim?

3. Are you "viable" — and comfortable— in this role? Explain.

Competition

Who OR What is the competition for Legacy Leadership®?

The answer to this question has been made somewhat easier for you with a comprehensive Comparison Chart provided by CoachWorks® International.

LEGACY Leadership®

Comparative Analysis of Leadership Models

LEADERSHIP MODEL	ORGANIZATION, PROFESSIONAL, OR BOTH	FOCUS	GOAL	ISSUES COVERED									
				Vision	Values	Collaboration	Innovation	Inspiration	Influence	Differences	Community	Responsibility	Accountability
Smith/ Sandstrom: Legacy Leadership	Both individual and organization	The "who" of the leader and the "what" of behavior. Based on a comprehensive set of 5 Best Practices: 1. Holder of Vision and Values 2. Creator of Collaboration and Innovation 3. Influencer of Inspiration and Leadership 4. Advocator of Differences and Community 5. Calibrator of Responsibility and Accountability	To create a multiplication effect where leaders develop leaders, who develop leaders, who possess strength and agility to direct the organization to high levels of competition, profitability, and commitment to service of others.	X	X	X	X	X	X	X	X	X	X
Kouzes/ Posner: The Leadership Challenge	Individual development as he/she impacts the organization	Leader abilities 1. Challenge the process 2. Inspire shared vision 3. Enable others to act 4. Model the way 5. Encourage the heart	To develop behaviors to serve as a basis for learning to lead.	X	X	X	X	X	X	X		X	
Covey: Principle-Centered Leadership	Individual leaders	Principles on which to base leadership: 1. Alignment 2. Empowerment 3. Trust 4. Trustworthiness	To practice leadership from perspective of 4 "true north" principles	X	X				X			X	
Nanus: Visionary Leadership	Individual leaders	Helping to develop the right vision	Guidance for leaders to develop vision and strategy	X	X								
Greenleaf: Servant Leadership	Individual leaders	On the being of the leader and his/her highest priority of serving others	To serve first, lead second	X	X			X			X	X	
Ball: DNA Leadership	Individual leaders and Organization	Goals are the transforming agent that creates a DNA culture	Using DNA fabric to guiding and growing the Goal-Driven organization	X	X		X	X					
Oakley/Krug: Enlightened Leadership	Both leaders and organization	Right vision while leading organization members to accept ownership for it and commitment to implement vision	To inspire others to act and developing other leaders	X					X			X	
Blanchard: Situational Leadership	Individual professional	Leadership style people need to be successful at what they are doing—Three stages of change based on situational need: Starting and orienting the journey Change and Discouragement Adopting and Refining Empowerment	Re-orients leader style based on evaluation of situation. Focuses on diagnosis, flexibility and partnering.	X	X	X				X		X	X

Competitive Edge

You can further define your **competitive edge** by looking very closely at your competition and their offerings in comparison to Legacy Leadership®. Competition is good –if there were no competitors it would either mean that there is no market for your products and services or it is too new for people to recognize its value. This second situation is slightly true for Legacy Leadership®. As you see from the Comparison Chart Legacy Leadership® transcends AND includes many other leadership approaches available and fills the gaps of the leading successful programs available today.

"Go to school" on these organizations. Research them on the Internet, ask colleagues about the ones they are familiar with. Ask your potential clients about them – and know enough about the comparisons to engage in informed conversation about the specifics. Initially you can learn more about the approaches by talking with people who have direct experience with them.

You will want to be informed on at least these facts (about the competition to Legacy Leadership®):

1. Names and addresses of head offices
2. How long have they been in business
3. What markets they target
4. How they position themselves in your markets
5. Key customers
6. The user friendliness of their programs and services.

Growing edge

Identify your relative strengths, and the ones you are growing, in order to plan longer term how you will continue to have a strong competitive edge with your products and services.

CoachWorks® is constantly developing new and updated programs, materials and products. They are dedicated to providing current market and business information and groundbreaking programs in a variety of market audiences and formats. You can be assured, as a Legacy Leader, of comprehensive highest quality information and service, which translates into competitive advantage.

A Word about "Co-opetition"

In most of the modern theories of business, competition is seen as one of the key forces that keep firms lean and drive innovation. That emphasis has been challenged by Adam Brandenburger of the Harvard Business School and Barry Nalebuff of the Yale School of Management. In part using some of the ideas of game theory, they suggest that businesses can gain advantage by means of a judicious mixture of competition and cooperation. Cooperation with suppliers, customers and firms producing complementary or related products can lead to expansion of the market and the formation of new business relationships, perhaps even the creation of new forms of enterprise. They chose ***co-opetition*** for this concept (a blend of *cooperation* and *competition*), which they used as the title of their 1996 book, **Co-Opetition : A Revolution Mindset That Combines Competition and Cooperation : The Game Theory Strategy That's Changing the Game of Business** which explains their theories. However, it seems that they didn't coin the word: it was Ray Noorda, the founder of Novell, who did that. The concept, and the word, seem to have been taken up most enthusiastically in the computer industry, where strategic alliances are common in order to develop new products and markets, particularly between software and hardware firms.

Excerpt from ***World Wide Words***© Michael Quinion

We invite you to really think about who you currently consider a competitor that you might set up a "co-opetition" with – you referring into their niche and he or she into yours –much more in the spirit of Legacy Leadership®!

It is also key to remember that Legacy Leadership® is primarily in the ***Introduction***/ ***Innovative*** phase. This means there is great flexibility in delivery options and broad opportunity for customizing services to your clients' needs.

Presenting Your Business

Can you describe what business you are in? It will serve you greatly to prepare and integrate (so you can speak naturally) two types of short presentations of your business (your heartfelt description about what you do and why it matters). Use the worksheet information you completed earlier and provide any additional information you need to complete the following presentations.

Elevator Chat Worksheet

Elevator chat (1-2 minutes)
Imagine you are on an elevator, wearing a Legacy Leadership® vest (or one with your own company logo). Someone steps on the elevator and asks you about it. What do you say? Use this worksheet to write a brief summary of how you would describe your business and Legacy Leadership®.

My "Elevator" Speech

Airplane Presentation Worksheet

Airplane Speech (10 minutes – this will ultimately express your mission statement) Imagine you are on an airplane and the person sitting next to you asks you what you do – respect and attention span dictate that you wouldn't take more than 10 minutes to tell him or her!

If your seat mate casually asks about your business, will you know what to say? Will it be logical and ordered? To answer the question 'What business are you in?' you should be able to clearly identify and articulate the following questions. Write down bullet points here that illustrate your "airplane speech."

My "Airplane" Speech

1. What is your business interest?
2. What is your service?
3. Who are you customers?
4. What do they consider valuable?
5. What is your vision?
6. What is your BHAG? *(see p. 24 for definition)*
7. How do you plan to reach your BHAG?
8. What is your mission statement?
9. Why are you in this business?
10. What is in it for you?
11. How does WYSIWYG (What you see is what you get) apply to your business?

For further conversation:
Is your business set up to model Legacy Leadership® ***Best Practices***? Be sure they are visible. Can you link the features and benefits of your products/services to the 5 Best Practices?

A definition is enclosing a wilderness of ideas within a wall of words.
Samuel Butler

Your core strength (competency) becomes your competitive edge.

- What is the competitive edge of your personal business? How does Legacy Leadership® enhance that position?
- Is your competitive edge temporary?
- In what way, in your business and market planning, can you make it sustainable?

Competitive edge helps to define your target market.

#	**What your business is known for NOW.** *10 Descriptors (i.e., leader in field, reliable, innovative, etc.)*	#	**What your business will be known for ONE YEAR from now.** *Where your growing edge will take you, your vision for the future*
1		1	
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10		10	

Section 2:
Creating Strategy with Vision and Values

Marketing Application of Best Practice 1

The vision and strategy of your marketing plan provide the guiding light, the structure and the pathway from **Conduction** of your messages to the **Commitment** of your prospective clients to start, and continue, doing business with you.

Before crafting and articulating your vision, you must first define your market. Consider the following definitions.

> **To be persuasive, we must be believable,**
> **To be believable, we must be credible,**
> **To be credible we must be truthful.**
> *Edward R. Murrow*

Commodity
In the marketplace a **Commodity** is defined as a mass-produced unspecialized product, something useful or valued; one that is subject to ready exchange or exploitation within a market. By these definitions, the commodity "leadership development" represents the total number of leadership development products and services available in the total marketplace.

Market
The market is the demand for and trade in a particular commodity, and the body of existing or potential buyers for specific goods or services.

Total Market
For the purposes of positioning Legacy Leadership®, this is the market for the commodity we will call "leadership development."

Market Research
Market research is defined as research into the size, location, and makeup of a product market. *(Merriam Webster)*

Who wants to buy your products and services? Some answers, in addition to your own knowledge of readiness indicators and your experience, are in the facts and figures provided either publicly (formal) or from your own custom designed search (informal). This may include probing conversations and/or questionnaires. The Internet is an inexpensive and comprehensive market research tool.

Elements of Market Research, and the path to your market definition, will include:

Historical Market – who has bought in the past??
For Legacy Leadership®:

- Initially, in public sector, coaches and facilitators
- Entrepreneurs who saw the opportunity to enrich their own business offerings to clients
- Leadership trainers within organizations – Legacy Leadership® Facilitator Certification (Level 2)
- Executives within organizations – Legacy Leadership® model/concepts, plus coaching

Database Market
Detailed consumer information in a database form. This allows you to precisely allocate marketing efforts to the most productive market segments for your particular product or service. You will have to build this over time. It will be a combination of: contacts you receive from personal or public connections, data you will collect in the specific segment areas of your business (i.e. corporate, public, coaches, kids) as a product of ongoing marketing efforts.

Potential Market
Who ***might*** buy...

Market Niche
A *fragment* of a larger market that is especially *suited to your unique products and services* – i.e., Legacy Leadership®. The market niche should be a place in the total market that is large enough for you to grow and make a profit and yet small enough to create strong relationships and defend against newcomers. It is best to pick a niche that seems to be underserved. Include a section in your Marketing Plan for connecting with potential clients and creating business relationships in your market niche for the next year. Begin thinking about your market niche.

> **No point trying to sell ice to Eskimos when there is a ready market in Florida. Know who your market is, where they are, and what are the best ways to reach them. Don't waste your precious time (or theirs) heading down the wrong path.**
> *Bangs and Axman*

Target Market
Who is *most likely to buy* (they have the money), is *most willing to buy* (they want the product), is *most accessible to you* (your promotional messages reach them), and can most easily purchase from you (proximity is important, either geographic, telephonic or electronic). Keep the Pareto Principle in mind: the paraphrase of the Pareto Principle (Vilfredo Pareto) is **80% of your results come from 20% of your efforts.** Who will you envision and attract as clients?

Market research will be invaluable in preparing you to determine your niche and segment.

So… leadership development is the **commodity**, Legacy Leadership® is a unique offering attracting a certain **market niche**, and your particular business has a further uniqueness for your more finely defined **target market**.

Market Segmentation
Segmentation is a way of categorizing the market so you can isolate and focus on clients ***most likely*** to be attracted to your product or service. The purpose is to create a picture or description of your ideal client, which helps you determine the best way to reach such clients. This becomes part of your marketing plan.

Once you determine your market "segment," you should be able to align your actions to Best Practice 5 by being able to measure the segment and your access to it; know that your product/service can meet their needs better than the competition, and ensure that your customers perceive better value from your service than that of the competition.

There are several ways to segment a market:

Geographic
Where are you, in geographic relation to your potential clients? This is most relevant if your market niche is corporate clients for customized programs, with integrative coaching as part of the process, as this requires at least some face to face presence. It is not a factor for public Institutes or Tele-Classes.

Behavioral
This is about what people do *(see Section 5)* in response to the product you are selling, and your marketing efforts. There are distinct behavioural traits that affect marketing.

Demographic
Are age and family structure relevant for the business you are wanting to develop? For the growing market of children and youth (Educational Model), this is a valid consideration. The US Census Bureau, www.census.org, is a great resource for national and international information. For information specific to Canada, go to www.statcan.ca, which is not as well laid out, but provides enough information to work with.

Psychographics
What do you know about your groups' behavior patterns, attitudes and expectations? Tools for answering this question would include VALS (value and lifestyle structure) which was created by researchers at Stanford University in the early 1980's to describe nine different lifestyle options. *(See information under "Positioning" in the introduction.)*

Sociocultural
Religion, national origin, race, social class and marital status (probably not relevant for Legacy Leadership®)

Long-range planning does not deal with future decisions, but with the future of present decisions.
Peter Drucker

Crafting a Marketing Vision Statement

Your personal vision, your business vision, and your marketing vision must be in alignment in order to be effective. What is the thread that connects them? You have had opportunity to craft your personal vision (in the Legacy Leadership® Learning Journal), Resources Section) and your business vision (in this section). Now take the time to develop your marketing vision using the same methods and ultimate goals. Write them all here in a brief summary *(next page)*.

BP1a

A Holder of Vision assures that organizational vision is kept as foundation of every project and goal until it becomes an automatic "reflex."

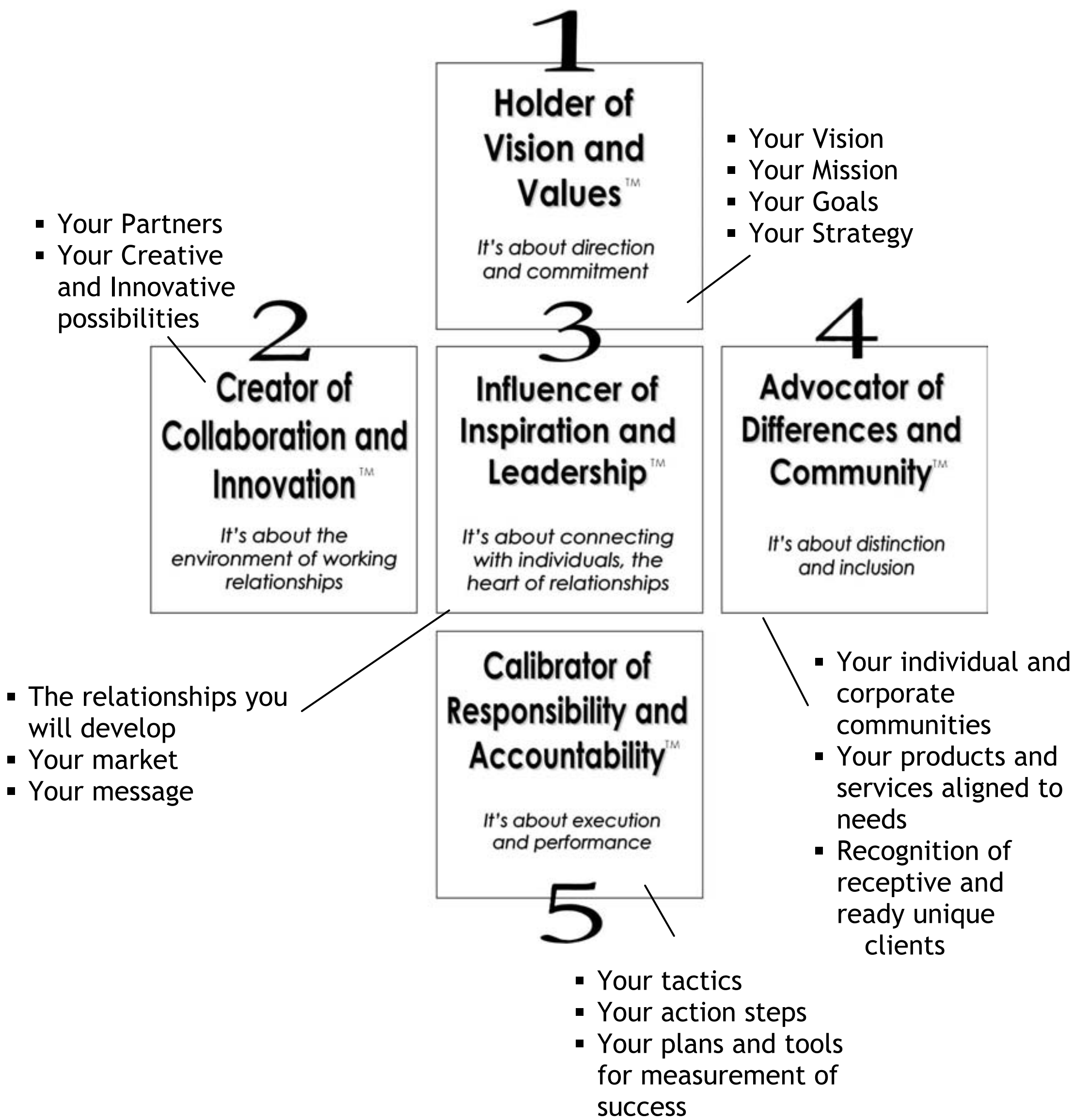
—The Legacy Leadership® Field Guide

Vision Alignment Worksheet

Briefly summarize your PERSONAL vision, your BUSINESS vision, and your MARKETING vision. How do they align? How do they connect? What is the pathway that brings them all into alignment? *(Use bullet points if that suits your needs better here.)*

PERSONAL VISION	BUSINESS VISION	MARKETING VISION	ALIGNMENT? CONNECTING THREADS?

Applying the Model to Marketing
Through your research and articulation of your marketing vision, you are poised to construct your actual Marketing Plan. This plan can easily be crafted using the 5 Best Practices as a framework, which ensures that you will be covering every required aspect of a successful marketing plan.



Your **Market Plan** will draw the path beginning from where you are (what business are you in, what is its current state?) to where you want to be in one year (what business do you want to be in? - your growing edge) If you develop your growing edge with awareness, intention and action, you can attract your dream clients.

Your BHAG (Big Hairy Audacious Goal)
The concept of BHAG became popular after the publication of the book "Built to Last: Successful Habits of Visionary Companies" (Harper Business). It is so big and extensive, and possibly risky, that it may at first seem unachievable. Your BHAG directs your marketing strategy and planning. Your BHAG prefaces the framework for your marketing plan. It should include image goals—how you would like to be seen and perceived in your marketplace. *(NOTE: One of the reasons to avoid attracting an organization not ready for Legacy Leadership® is that the attempt to integrate this type of model will not succeed and this will become part of your reputation. You want to be perceived as aligned with organizations where Legacy Leadership® has succeeded – your vision will include testimonials of their success!)*

As you create your Marketing Plan, you will need to know the following:
(A worksheet for these questions is found on the following pages.)

- **Your core strength** (competitive edge)
- **Your relative strengths** (growing edges)
- **Your favorite clients**
- **Your dream clients** (What attributes, qualities…, etc.)
- **First Connections** (how do you approach these clients the first time?)
- **Common Client Characteristics** (What do these clients have in common?)
- **Your Follow-Up Plan**
  Be sure to include in your plan your "after sale" or "after program" procedure – spell it out. Will you call, e-mail, send a thank you note? Are you close enough to take them to lunch for a little one-on-one feedback? Following up and nurturing a current client is very good business. For example:
  - Have they completed Level 1 certification and can you mentor them as they integrate LL into their business practice?
  - Have you facilitated a public Institute and can now support individuals who are Level 2 certified to take Legacy Leadership® into their organizations or communities of interest?
  - Have you worked with a small segment/department of a larger organization and now can broaden the scope?

Rule of 5

It costs 5x as much to attract a new customer as it does to do repeat business with an existing client.

Try your hand at completing the initial marketing plan worksheet on the next page.

Pre- Marketing Plan Worksheet

Use bullet points to capture your thoughts about the following items mentioned on the previous page. These will become integral parts of your final marketing plan.

What is your BHAG?	
What is your core strength? (competitive edge)	
What are your relative strengths? (growing edges)	
Who are your favorite clients?	
Who is your dream client? (attributes, qualities)	
How do you make first contact with these clients?	
What do these clients have in common?	
What will be your typical follow-up plan? How will it differ for each client?	
Other comments	

A Word About Values

Best Practice 1 is also about VALUES. While you pursue your market niche and actively promote Legacy Leadership®, always consider whether what you are doing fits easily within your personal and organizational values system. Never compromise. Never flinch on values. You might want to consider completing the "Developing Values" Worksheet at the back of the Legacy Leadership® Learning Journal, in the Resource section.

BP1b

The Holder of Values models authenticity. His or her personal and professional life is seamless.

The Holder of Values will:

- **Be able to easily articulate the organizational (as well as your personal) values for both clients and fellow team members. The talk is important, but remember that the walk is the loudest communicator.**
- **Alert team members when particular values may be compromised during any decision making process.**
- **Allow for course correction to values.**

—The Legacy Leadership® Field Guide

Section 3

Section 3:
Innovation and Collaboration in Marketing

Application of Best Practice 2

From Conduction to Attraction to Connection: The shift from Marketing to Sales
The marketing activity is almost completely captured in BP 1. This includes the strategy and plan for the **conduction** of information into your marketplace with:

- customers and partners defined
- messages
- measures identified for keeping track of progress and effectiveness of communication
- Measures of success

Now we come to the connecting—or COLLABORATION—part. This is the tipping point between marketing and sales. As people are **attracted** to your marketing messages, from the moment the conversation starts, the selling/buying relationship begins.

All of the following are examples of innovative collaboration which will reduce your stress and optimize your success!

BP2a

A Creator of Collaboration will:

- **Be specific about shared goals and interests.**
- **Create an atmosphere of flexibility and adaptability.**
- **Ask tough questions (ones he or she does not know the answer to), and hear the answers.**

—The Legacy Leadership® Field Guide

Collaborate with Colleagues
Who in the Legacy Leadership® Community has similar business interests to yours? Talk with fellow business associates in a similar but non-competing business and share marketing strategies. Chances are that if you tell them what worked for you they will tell you what worked for them; win—win in the spirit of Legacy Leadership®.

Connect with others in the Legacy Community to continue discovering Legacy-specific marketing and sales nuggets. Communication with the Legacy Community, individually and in groups, will support business partnership opportunities.

Collaborate with Clients
People don't buy products and services. They buy solutions to their problems, pathways to their visions and desires for themselves and/or their organizations, and satisfactions for their wants and objectives. It will be important to help them identify solutions.

What do your clients really, really want??

The answers to this question will vary according to who you have identified as your segmented market. This is where you will want to attend to the difference between ***features*** and ***benefits*** of LL offerings. *(See the "Features and Benefits Summary Page" for Legacy Leadership® on the following page.)* Bear in mind some of the following:

What People Buy (Features—Benefits)

People buy benefits, not features. Somebody in the marketplace wants what you have. Who are they and what do they want? Focus your marketing by being alert to what really attracts consumer attention:

- People buy results, not products or processes
- People buy what they desire, not what they need (market / sell to compelling desire and then give them what they need)
- People buy the results of investments, not the investment itself – make the connection – invest in what will support your long term success (Vision, BHAG)
- People won't buy what they can't feel. What are the simple, specific and compelling benefits of Legacy Leadership®? (story very valuable here)
- People buy from "style" – know your quirks and strengths and then get a "style buddy" (someone who can complement your style!)
- People buy themselves, not a program. Sell people on themselves.
- People buy relationship in a highly technical world. In some cases (leveraging style) there can be a shift from selling tangibles to selling strong, value-added relationships. Optimally you aim to connect with two people within an organization with different styles (one task and one relationship). They each get what they want –the result is a stronger YES.
- People buy what's easy – what is an easy way for them to connect to the Legacy Leadership® framework? What is the Legacy "doorway" to their business issue(s)?

After identifying what they want to buy, connect this with what you have to offer. Get "in the way" of what they are already looking for. Where is the intersection between their compelling desires and the benefits of Legacy Leadership®? Look for the overlaps.

Practical Tools

It seems a very simple and logical observation but it actually takes some time to notice that the people and organizations attracted to Legacy Leadership® are those already practicing it at some level. Individuals and companies who demonstrate their caring for others and understand with their heads and hearts that effective relationships are critical to effective business practice are very likely candidates for Legacy Leadership®.

- **Listen for Legacy language (look for Legacy behaviors).** These may show up either implicitly or explicitly.

- **Listen for what they are committed to** – personally and professionally. Do they have a strong vision? BP 1 – it's all about direction and commitment.

Features and Benefits Summary Page

From Success to Significance to LEGACY

Features

Legacy Leadership® is:

- **A comprehensive framework** of practices, behaviors, attitudes and values that addresses every aspect of successful leadership (not just selected skills and competencies).
- **A set of 5 Best Practices that changes the culture** of an organization from a command post to a community, balanced in its approach to both people and production.
- **A unique approach to leadership** that maximizes professional (personal) and organizational (company) effectiveness.
- **A philosophy** (not a "prescription" plan) of leadership that encourages confidence, learning, wisdom, courage, insight and compassion.
- **An ageless way to develop personal potential** that models real leadership for others
- An extremely ***flexible and adaptable leadership model*** and development program.

Benefits

Legacy Leadership® will allow you to:

- Realize permanent shifts in leadership behaviors to influence others and develop excellent leaders who develop excellent leaders.
- Adopt a leadership philosophy that will have lasting and far-reaching results, instead of a prescription.
- Learn how to maximize personal and professional potential through a process that grows both the organization and the individual.
- Determine how to attract and retain high potential employees of diverse perspectives.

Expected Outcomes

BP	ACTION/ BEING	OBJECTIVE/ DOING	FOR THE ORGANIZATION	FOR THE PROFESSIONAL
1	HOLDER	VISION	▪ Clarity of focus ▪ Strategic implementation against vision ▪ Consistent communication about focus	▪ Reminds people of what's important ▪ Clear alignment with followers ▪ Brings whole self to leadership
		VALUES	▪ Reputation of a company with values ▪ Congruent guiding principles in the culture ▪ A culture of integrity	▪ "Walks the Talk" of personal core values ▪ Has meaning and purpose for efforts ▪ Models authenticity
2	CREATOR	COLLABORATION	▪ Fosters environment of trust and loyalty ▪ Breaks down "silos" ▪ Creates flexibility and adaptability	▪ Puts ego aside to hear brilliance of others ▪ Builds teams and networks ▪ Brings out best, asks tough questions
		INNOVATION	▪ Creative energy for competitive advantage ▪ Fast learning ▪ Environment of thought leadership	▪ Enhanced personal creativity ▪ Ability to shift quickly, personal agility ▪ Embrace change as opportunity
3	INFLUENCER	INSPIRATION	▪ Highly motivating environment ▪ Encouragement to bring whole self to work ▪ Employees feel valued for contribution	▪ Is both inspired and inspiring ▪ Passionate with focused energy ▪ Models that work is FUN
		LEADERSHIP	▪ Develops emerging leaders at all levels ▪ Links leadership with strategic plan ▪ A systems focus on leadership practices	▪ Stretches to be the best ▪ Leader competencies developed ▪ Has a "platform" for actively mentoring
4	ADVOCATOR	DIFFERENCES	▪ Is a "connoisseur" of talent ▪ Taps abilities of ALL, including "fringes" ▪ Reduced turnover, greater retention	▪ Discovery of own uniqueness ▪ Finds own distinguishing strength set ▪ Learns from those who are different
		COMMUNITY	▪ Reputation attractive to employees ▪ Greater commitment to community ▪ Greater sense of authentic purpose	▪ Gets voice heard while hearing others ▪ Releases old biases, is inclusive ▪ Makes alliances between leader and led
5	CALIBRATOR	RESPONSIBILITY	▪ Right people in right jobs ▪ Optimized strengths ▪ Consistent standards	▪ Is the right leader for the job ▪ Produces excellent results, value added ▪ Requires everyone's personal responsibility
		ACCOUNTABILITY	▪ High level of achievement ▪ Measurable outcomes ▪ Loyal customers	▪ Holds self and others accountable ▪ Communicates expectations ▪ Calibrates regularly and consistently

Section 3: Innovation and Collaboration *(continued)*

- **Listen for the Legacy "doorway"** to enter into a deeper conversation. This is an opportunity to connect stated leadership opportunities and challenges with Legacy Leadership® as a possible path to solution – from challenge to possibility to opportunity.

The Right Fit

You will undoubtedly find that your successful connections and business interactions will be based on "right fits" for your client - right relationship, right questions, right effort, right timing, right benefits.

Right Relationship

Are you talking to the person in the organization who can say "yes" - and champion your efforts? In every organization there is always one person who can say **"yes"** when everyone else says "**no.**" It is imperative to identify this person and have an intentional plan to connect with him/her. When first connecting with any organizational representative, do not hesitate to ask this question, "Who needs to agree that Legacy Leadership® is the right approach to leadership development in your organization for this to actually become part of your strategy?" Ideally there will two peers at a "yes" level, who will support one another in anchoring the commitment to Legacy Leadership®.

Right Questions

Are you asking the right questions to get to what they really want, or want to know? In our society we are not always encouraged to ask questions. It may be considered rude and "nosy." Contrary to this myth, however, people generally love to be asked about themselves and their opinions about things.

When it comes to asking for business we are often reluctant because we are afraid to hear "**no.**" A guideline for big time savings and easier relationships all around is to be open to "no" from the beginning of the conversation. This way, if the person is really not ready, for whatever reason, for Legacy Leadership® you can make it very safe for them to say so and then you can both get on with other things – or conversations. Secondly, when you remove the fear of **no** and come from a place of genuine curiosity, the person will feel this also, will have nothing to resist and this often opens the conversation to go wider and deeper. This is a key element in qualifying potential clients.

> **You create your opportunities by asking for them."**
> *Pattie Hansen*

Consider Asking These Questions:

After a brief introduction to Legacy Leadership® and making the connection with their expressed interest, try asking:

- What is working in your organization? Examples (core strength to build on)

- What one thing might your organization do that would increase your effectiveness as an organization? (Legacy doorway)

Section 3: Innovation and Collaboration *(continued)*

- What are your leadership challenges - Personally? Organizationally? (use Model Card)
- What most attracts you to the Legacy model? (Use Model card to identify Legacy doorway)
- What do you yearn for?
- What is your personal vision?
- What is the organizational vision?
- Are they aligned?
- If not, do you see a way they could be?

When you consider whether or not to ask such "probing" questions, also consider this: ***"Man who waits for roast duck to fly into mouth must wait very, very long time."***
(Chinese Proverb)

> **What I point out to people is that it's silly to be afraid that you're not going to get what you want if you ask. Because you are already not getting what you want. They always laugh about that because they realize it's so true. Without asking you already have failed, you already have nothing. What are you afraid of? You're afraid of getting what you already have! It's ridiculous! Who cares if you don't get it when you ask for it, because, before you ask for it, you don't have it anyway. So there's really nothing to be afraid of.**
> *Marcia Martin*

Right Effort
This will come from really listening to what the person is telling you they want – respond to what they say they want—it doesn't matter that you may see clearly what they need! Or you may not know their organization well enough to be able to accurately assess this. Respond to their stated compelling desire – there will be ample time to give them what they need.

Right Timing
Individuals and organizations have vastly different planning horizons, often reliant on time flexibility and budgets. It has been the experience of Legacy Leadership® facilitators that the time from introduction of the model and concepts, to commitment to either a public Institute or a customized organizational program, is somewhere between 6 months and one year. Factor this into your business plan. As Legacy Leadership® moves more into the *growth* phase of its life cycle, this time may shorten, yet it is important to remember that this is a thoughtful commitment to comprehensive behavior change.

Right Benefits
Use the "Features and Benefits Summary Page" for Legacy Leadership® (page 28) to point out how Legacy Leadership® may provide a "benefit match" for the organization or the individual. Listen carefully to expressed needs, desires, challenges (and even for those which are not voiced out loud). Many of the obvious features and benefits of Legacy Leadership® are not found in other leadership models. Legacy Leadership® is a comprehensive framework, highly adaptable and flexible, which is one of its strongest selling points. Also listen for how Legacy Leadership® can be adapted to specific needs, challenges or opportunities.

Collaborate with Facilitator (Level 2/3) Community

Mentoring
This can be either an informal or a formal arrangement. Some Legacy Leadership® facilitators may offer limited complimentary mentoring, followed by "fee for service" mentoring support. Be clear on what specific areas of support will be most useful to you. What is your growing edge from a marketing perspective?

Peer Partnerships with Legacy Leadership® Colleagues
Look for opportunities to form collaborative partnerships with others within the Legacy Leadership® Community for the purpose of marketing, or even presenting and delivering programs. This models the heart of Best Practice 2. It also leverages style strengths and maximizes skills and gifts. A careful partnership or alliance with others can often match your combined abilities to the diverse styles and needs of clients. Such collaboration spreads out the workload and can increase profits and success. It also is very helpful to have someone to hold you accountable throughout the process. We highly encourage these partnerships and have seen some reach an enviable level of success.

BP2b

A Creator of Innovation will:

- **Commit all ideas to writing, and all process evaluation is documented and logged for review.**
- **Share all ideas, all processing, all input and feedback, AND the final product.**

—*The Legacy Leadership® Field Guide*

Section 4:
Influential and Inspirational Marketing

Application of Best Practice 3

Getting the Word Out
This involves more *conduction* of information to attract interest in Legacy Leadership® and *connect* in conversation in order to gain *commitment* to Legacy Leadership®. A variety of marketing materials have been created and developed by CoachWorks® to respond to the expressed desires of clients for varying depths of information, often connected with style. Some people want their information to be short, sharp and to the point, while others want more comprehensive information. For this reason there is quite an assortment of materials available for you to draw upon.

Available Marketing Materials and Recommendations

E-invitation to a Public Institute (LLI)
This is an opportunity to connect with a wide database at very little cost and an open opportunity to connect people with whatever depth of information they desire, through links and attachments.

As a way of leveraging the multiple-contact theory we have built in a couple of "savings windows" into a "4-hit format."

1. The e-invitation can be sent out to a broad number as an introduction to the Institute event. It is recommended that you send this initial invitation several months in advance of the date. (Determine your calendar well in advance, with these dates flagged for distribution times.)

2. Resend the e-vite about a week before the end of the first savings offering, with a pre-note reminding them to register before "x" date if they are interested in a break in their tuition.

3. Resend the e-vite a few days before the second savings opportunity expires.

4. Resend the invitation a couple of weeks before the Institute is about to happen. There are always people who make last minute decisions and for whom money is not a deciding factor.

Market research has shown for many years that it takes at least four to five contacts for a message to be received and integrated.

Section 4: Influential and Inspirational Marketing *(continued)*

Your e-invitation should be simple and to the point, and can be contained in the body of the e-mail. Here is an example:

(your company logo or Legacy Leadership® logo)

Contemporary Leadership for Uncertain Times
(or some other tag line that you like….)

What can we do today to lead our organizations and communities of interest into a strong and sustainable future? Become a Legacy Leader® through the 5 Best Practices of Legacy Leadership®, in Vancouver, British Columbia.

A ***Legacy Leader®*** is:

1.A **Holder of Vision and Values™** (It's about direction and commitment.)
2.A **Creator of Collaboration and Innovation™** (It's about the environment of working relationships.)
3.An **Influencer of Inspiration and Leadership™** (It's about connecting with individuals, the heart of relationships.)
4.An **Advocator of Differences and Community™** (It's about distinction and inclusion.)
5.A **Calibrator of Responsibility and Accountability™** (It's about execution and performance.)

Legacy Leadership® is a transformational leadership model developed by CoachWorks® International, and presented in Institute format by **The Odyssey Leadership Centre** and **Full Spectrum Coaching** in partnership with **CoachWorks®.**

Level 1: 3-day Institute – October 29th –31st, 2003
For those wishing to use the model and materials within a small organization or in private practice. In this highly interactive process you will learn and experience each practice - the beliefs, attitudes, skills and behaviors that make up that practice. Ultimately, it is as you develop and assimilate the five practices that you *become* a ***Legacy Leader®***.

Ask about our **New Tele-Class Format –** 3 month program of twice weekly 90-minute classes and fieldwork, scheduled to begin May 4, 2004. Call 604-929-4290 for details

Level 2: International Facilitator Certification
For those wishing to facilitate publicly, or with client organizations – November 1st. 2003

For more information on the upcoming program visit (your website, or CW site info pages)

For comprehensive info including hotel and logistics visit (your website)

(continued next page…)

(e-vite continued)

Take advantage of:
10% savings by registering before August 15th, 2003
5% savings by registering before September 15th, 2003
10% savings per person for two or more from the same organization

Choose to live the legacy of YOUR leadership, and join the expanding circle of Legacy Leaders in the world. If you would like to learn more about my background as a facilitator, please visit: www.followtheleader.ca. I would be delighted to speak with you about Legacy Leadership® by phone (604) 929-4290 or by return e-mail Brenda@followtheleader.ca. I look forward to hearing from you.

Warmest Regards,

Your version of this e-vite can be worded as you choose, but should include all the pertinent details up front.

BP3a

An Influencer of Inspiration will:

- **Connect personally with others, valuing them Individually and corporately.**
- **Keep the heart included in all processes.**

—*The Legacy Leadership® Field Guide*

Section 4: Influential and Inspirational Marketing *(continued)*

General Legacy Leadership e-brochure
CoachWorks® International has also developed a 10-page color e-brochure which provides a comprehensive description of Legacy Leadership. The contents of this brochure are not customizable, though you may choose to include your company logo and contact information on the front page of the brochure.

Legacy Leadership® Model Card
This 8 ½ x 11 laminated two-sided card is a must to carry with you at all times, in your folder or briefcase. You never know when the opportunity will arise to have a conversation about Legacy Leadership®. This card essentially holds a simple yet colourful synopsis of the key elements of the model. Have your elevator or airplane presentation at the ready! (Available at CoachWorks® webstore.)

Websites
The CoachWorks® International (www.coachworks.com) and Legacy Leadership® (www.legacyleadership.com) are rich sources of information about Legacy Leadership®. CoachWorks, as part of their service to the Facilitator Community, will post your event at this website. Make sure you send all relevant information well before the event to info@coachworks.com.

Promotion
Promotion is a combination of marketing and sales and includes your personal activities, professional marketing services, and advertising. Promotion begins by becoming an expert and getting "slightly famous."

Becoming An Expert
Publisher, author and international keynote speaker, and winner of the first Legacy Leadership® Award (2004), Peter Legge says, "Read your way to expertise." He maintains that if you read, on a chosen subject, for only 15 minutes per day, in a year you will be a local expert, in three years you will be a national expert, and in 5 years you will be an international expert on that subject.

Although leadership development is on the upward trend as a market commodity, you are in a unique and enviable position as the facilitator of a new and innovative leadership model. By intently, and with discipline, becoming a "student of leadership," in as little as 15 minutes per day you are already on your way to becoming an expert in your field.

Getting Slightly Famous

In *Get Slightly Famous*, his debut as an author, Steven Van Yoder draws from his experiences helping clients become recognized leaders in their industries. His book includes interviews and case studies of over 135 entrepreneurs and leading business experts, outlining real-world marketing strategies that are relevant for small business owners. This book provides a practical marketing "toolbox" that shows how to:

- get consistent media attention
- use speaking engagements to cultivate your target market
- become a center of influence within your industry
- leverage the Internet to its full potential
- create ancillary "info-products" that supplement your income and build public awareness

> **You are the same today that you are going to be five years from now except for two things; the people with whom you associate and the books you read.**
> *—Charles Jones*

While you are working on creating a position for yourself as an "expert in the field of leadership" you might find it helpful to go to the CoachWorks® International website and read up on the company and its principals. There is a wealth of coaching and leadership information, as well as links to other sites.

The promotional activities you choose should be an intentional part of your marketing plan. Choose activities you have researched either generally, or through the Legacy community specifically, in order to show evidence of real success in your chosen market segment or niche. Your promotional campaign will be built around the image and message you want to convey.

> **You have only one chance to make a first impression.**
> *—Unknown*

Your Image

The Image is a combination of you and your materials (message). With all promotional efforts, you must remember that first impressions last, and image always counts. According to some, you have just seven seconds to make a lasting first impression.

Who are you?

This is the key, vital, and important element of the heart of Legacy Leadership® and defines your ability to connect with those who are attracted to the very essence of this model. Are you BEING a Legacy Leader® in all aspects of your behavior and business practice? You never know who is watching you and when. We have all had experiences of people who don't "walk their talk."

Your focus on continued development of the competencies of the *Best Practices*, and your growing edges, will reap two benefits: 1) This discipline will help you to internalize Legacy Leadership® so that you can easily respond to a wider and wider variety of questions about the model and its applications; and 2) you will find that as you become an increasingly impeccable example of Legacy Leadership®, potential clients will become attracted to you and what you have to offer. Sales will become increasingly smooth and effortless.

Section 4: Influential and Inspirational Marketing *(continued)*

What is your message?
The message will be a combination of the materials and the words you use. This will include your elevator and airplane presentations as well as additional notes you might add when sending flyers etc. to potential clients.

Attend to the impact you want to create, quickly and profoundly. Know the answers to these questions:

- What differentiates Legacy Leadership® from other leadership programs and offerings?
- Who are you wishing to attract?
- What are the words/phrases you have found most successful in attracting your dream clients?
- How can you keep it simple and choose the right message to share?
- What attracted you to Legacy Leadership®?

A good, strong sales presentation leaves a strong, positive image in the customer's memory and paves the way for future discussion. It's better to leave one strong visual image of the product's superior performance than to overwhelm the prospect with a multimedia song and dance.
—Bangs and Axman

Assessing Promotional Effectiveness
Promotion includes:
- Your personal activities
- Professional marketing services
- Advertising

Use these questions *(worksheets follow)* to assess effectiveness of your promotional strategy elements:

- What is the name of your business? *(your most effective and least expensive marketing tool)*
- Does it say who you are? *(as a Legacy Leader®?)*
- Does it clearly and explicitly tell your clients what you offer?
- Do you have a business logo?
- What is the fit between your business logo and the Legacy Leadership® logo?
- Are you clear on how to leverage the LL logo *(illustrating the 5 BPs, etc.)*
- Is there consistency in the look and feel of your business communication materials (Letterhead, business cards, flyers etc.) as there is with the LL materials? *(Note: This is why CoachWorks® is so careful in preserving the "right to*

reproduce" and provide facilitators with an array of marketing materials which cannot be altered – to preserve the quality and consistency of the "look and feel" of Legacy Leadership® and its image as being highly professional and of high quality.)

- What do you want to tell potential clients about your business and service/ program offerings?

- What do you think they want/ need to know in order to make a buying decision?

- Are your promotional materials and strategies effective in attracting your dream clients? If yes, how? If no, what changes are called for?

- Are your promotional materials and strategies effective to motivate potential clients to take action and promise them a benefit if they do? If yes, how? If no, what changes are being called for?

It is a good idea to have a variety of offerings to promote. (1, 2, and 3-day events, LLI, TeleClass, 360-feedback, organizational implementation, etc.) **Always have something to invite people to** (your events and other peoples'). This is an "attractive" practice, allowing for connecting different styles with what works best for them, and models some very important aspects of Legacy Leadership® – community and innovative collaboration.

Promotion Opportunities

Public Speaking

If you are comfortable speaking in front of groups (and not everyone is – remember that research tells us that the one thing most people are more afraid of than dying is public speaking!). If this is either an attractive idea and a strength for you, or an edge you'd like to grow, look for opportunities. There are a variety of possible venues. Once you have named your target market, where do they gather?

- Conferences: instead of (or as well as) attending, get on the program! The opportunities may be anything from main stage presenter, to workshop/session leader. (Exhibiting at Conferences will be covered under Trade Shows)
- Professional Associations
- Churches
- Local Civic Clubs/Chambers of Commerce (i.e., Rotary Club, etc.)
- Radio
- TV

If you have an opportunity to speak about Legacy Leadership®, and it is permissible by the organization that has invited you, be sure to offer a special savings for your next program—or your services *(be sure they are defined and well advertised)*—to the attendees, and have a colleague posted at the back of the room with registration forms. Be prepared to capture the enthusiasm you will create!

Legacy Leadership® is a highly adaptable and flexible program which lends itself well to specific and targeted application in a variety of fields (education, local community groups, churches, non-profit groups, corporate, civic and individual (adults and children) applications. Look for ways to adapt Legacy Leadership® to known needs or applications of potential clients.

Trade shows

Trade shows are a great opportunity to both deliver information about your programs and services as well as gather information on other products and services available in your market. Trade shows attract numbers of organizations in a similar market sector and this is a chance for you to do some effective one-stop selling, shopping, researching and networking.

There are some expenses to participating in trade shows, including:

- the cost of admission (routinely sold as flat rate or per/sq. ft booth space – usually comes with skirted table and one or two chairs)
- creating a professional looking table display (posters, etc.)
- having sufficient printed materials for distribution
- Give-aways and/or drawing gift

If you do intend to display at a trade show, it is recommended that you have ample materials advertising your own company and services, as well as at least one or more copies of all Legacy Leadership® materials which can be used for display. You might also want to have some sample business articles which will reinforce the effectiveness of Legacy Leadership®. (**Note:** Be certain to label your display items clearly with "**Display**" or "**Sample Only – please do not remove**." It is very common for trade show visitors to take any items that are not well marked as "display only.") If desired, you might also want to consider some "giveaways" either with your own company information, or Legacy Leadership® information. CoachWorks® International has pens, tote bags, keytags and other items (denim shirts, vests, etc.) available for sale at the webstore.

You will want to "man" your booth at all times in order to preserve and protect your materials, and more importantly, be available to answer questions and discuss potential areas of interest with those who stop by.

Key and Critical Opportunities of Trade Shows

The key objectives of attending a trade show are:

- Get information about Legacy Leadership® (and your own personal services) to potential clients

- Make connections and have brief conversations with potential clients

- **Get contact information for post-show follow-up**. This is done by collecting as many business cards as possible. A great way to ensure the maximum collection of cards is to have a drawing for an item attractive to booth visitors. It is recommended that you choose something associated with Legacy Leadership® and can be of small or large value. Place a large, attractive bowl on your display table

Promotional Effectiveness Assessment

Journal your responses to the questions on the previous pages and listed here. Can you satisfactorily answer the following questions? Give yourself an effectiveness rating score for each question (1—Poor, 2—Fair, 3—Average, 4—Good, 5—Excellent)

1	**What is the name of your business?** *(most effective tool!)*		EFFECTIVENESS RATING 1 2 3 4 5
2	**Does it say who you are?**		EFFECTIVENESS RATING 1 2 3 4 5
3	**Does it clearly and explicitly tell your clients what you offer?**		EFFECTIVENESS RATING 1 2 3 4 5
4	**Do you have a business logo?** *(describe or draw)*		EFFECTIVENESS RATING 1 2 3 4 5
5	**What is the fit between your business logo and the Legacy Leadership™ logo?**		EFFECTIVENESS RATING 1 2 3 4 5
6	**Are you clear on how to leverage the LL logo?**		EFFECTIVENESS RATING 1 2 3 4 5
7	**Is there a consistency in the look and feel of your business communication materials?**		EFFECTIVENESS RATING 1 2 3 4 5

Promotional Effectiveness Assessment
(continued)

8	What do you want to tell potential clients about your business and service/program offerings?		EFFECTIVENESS RATING 1 2 3 4 5
9	What do you think they want/need to know in order to make a buying decision?		EFFECTIVENESS RATING 1 2 3 4 5
10	Are your promotional materials and strategies effective in attracting your dream clients? How? If no what changes are called for?		EFFECTIVENESS RATING 1 2 3 4 5
11	Are your promotional materials and strategies effective to motivate potential clients to take action and promise them a benefit if they do? How? If no, what changes are called for?		EFFECTIVENESS RATING 1 2 3 4 5

for collecting the cards. When you speak with the person and want to remember what they were most interested in, be sure to make a small note on the back of their card before putting it in the bowl. You think, at the time, you will remember people and conversation but….you will be meeting a lot of people in these kinds of situations. Memory joggers will be a life saver when you pick up the phone to follow up!

Attend any receptions or meals made available to exhibitors. Be sure to have ample business cards as well as a few pocket model cards for discretionary distribution. You want to give these only to people who have expressed a deeper interest in Legacy Leadership® and who you think will use them to share the model with their colleagues.

Plan for Immediate Follow-up
Be sure to create a space on your calendar of at least one full day (you may not use it all but it is good to be on the safe side) immediately after the Conference/trade show. Plan the follow-up day to be within the week following the event. You may want to give people a few days to get back in their offices, get their urgencies dealt with, and have some open space to engage in conversation with you. If possible you may even ask them at the Trade Show when the best time would be for you to call. People actually do appreciate being asked this. It models the beginning of respectful relationship building. They feel respected and will usually give you some information about what times are good – and what times to avoid. This pre-empts you calling at an inopportune time. A common mistake of marketers is to call "out of the blue," effectively ambushing the person they are calling and with a much reduced chance of warm reception. It is, in fact, a great idea to pre-arrange phone dates whenever possible; this, by itself, will likely differentiate you from your competitors.

Networking Events
As entrepreneurship and small businesses increase, networking events have become a popular and effective way for people to connect and share their program and service offerings. When you choose the right networking events to attend, they can be a powerful connection to your market.

However, BEWARE. Since many small businesses are one-person operations, they don't have advertising resources and use these events for this purpose. You will find people who go to these events not to "network" but to "get work." This means they are only interested in telling you about their products, services and finding clients, and are not really interested in what others have to offer.

Before choosing which networking events you will attend, ask yourself some questions:

- What is the purpose/focus of this group?
- Who might attend?
- Who do you want to meet? *(Characteristics, interests, compelling desires?)*

Section 4: Influential and Inspirational Marketing *(continued)*

- How many people do you want to meet? (who are the max 10% with whom you can have influence? *See Influential Triangle in Section 5*)
- Is there an opportunity for a formal presentation?
- Is there an opportunity to keynote at some point?
- What would you like to learn?
- Who might be there that you could learn from?
- Are there opportunities for you to be able to distribute flyers?
- Who else might be there that may provide complementary services to leadership development, i.e. business planning, personal coaching, financial planning…? There may be opportunities for innovative collaboration!

In this way you can qualify your networking events in the same way you would a potential client. Be looking for the win-win, demonstrating appreciation all the different services/ skills it takes for comprehensive leadership development. Know your particular area of expertise and look for that of others at these events – Advocate Differences and Community (BP4)!

Individual Networking

You can also network one-on-one by asking a colleague or friend to introduce you to someone you'd like to get to know. Since Legacy Leadership® is a highly relationship driven product, this is a really effective way of connecting with the right people through one degree of separation – a very valuable part of your strategy and resources.

Is your "net" working? Who are you connected to and who are they connected to? Recall the exercise from the Legacy Leadership® Institute where we drew the "organizational" chart of our personal networks (this exercise is sometimes called "You, Inc.") It is a good idea to do this exercise every so often and refresh your network memory. Who do you know that may be of value to your colleagues/clients?

Newsletters or columns

If this is an area of expertise for you, this can be effective advertising forum for Legacy Leadership® and is a dynamic way to both position yourself as a leadership "expert" and communicate with a wider audience.

Both newsletters and columns get your message to a highly targeted group of readers. They can be opportunities for you to promote your programs and services at the same time as providing valuable information about leadership – trends and practices – and a great place to tell Legacy stories.

If you have a web site, consider an e-zine. These are timely, published regularly, and easy to read. If you don't have this capacity yourself, look for someone who does, and who may allow you to be a contributing writer in their newsletter or e-zine - another example of innovative collaboration.

Personal Mail
The personal touch is always welcome and particularly demonstrates the importance of relationship with unique, personalized communication that is the hallmark of Legacy Leadership®. A handwritten note or postcards are a memorable way to follow up with those you already have established a relationship with – the connection has been made.

Direct Mail
This strategy should be reserved for those who are already familiar with Legacy Leadership® – and you. There needs to be a fairly strong brand recognition so that your missive doesn't end up in the recycle bin! There are also moderate expenses connected with any kind of print advertising. Return on investment for direct mail advertising is notoriously low.

Promoting in Partnership
Just about anything is less stressful and more fun when you have a buddy or partner, and there are a variety of ways in which you can maximize the power of your expertise and a wider market by partnering. When choosing partners it is really advantageous to look for someone whose style is complementary and opposite to yours. For example, if your style is high in relationship, choose a partner who has a high task style. This way, whether you are marketing public programs or calling on a corporate client you will have the best chance of connecting with both those styles in potential clients. This kind of partnership also insures a more productive team.

With Other Legacy Leaders
The Legacy Community is a wonderful place to seek partnerships – joining your area of expertise with another Legacy Leader® and leveraging one another's warm markets. This could be, for the corporate setting, a combination of coaching and facilitation skills , as well as contacts. As we grow the Legacy Leadership® Community and offer public events that are accessible to anyone in the world, you may choose to offer referral commissions to Legacy colleagues (and others) for referrals to your programs.

With Colleagues/Businesses Offering Complementary Programs or Services
This is an opportunity either to co-market or offer to send out information to one another's networks, and can be a great opportunity to model "advocating" for the value of different services.
With organizations: Volunteer!
Partnering with organizations is a double win. You can make great business contacts and at the same time achieve a great deal of personal satisfaction by giving to the community of your choice. Your time and contributions will undoubtedly be much appreciated by the organization and its members and it also is a wonderful way to model yourself as a Legacy Leader.

Section 4: Influential and Inspirational Marketing *(continued)*

As a Mentor
This is an essential way to model Legacy Leadership® in the world and "grow" other leaders. Use the expertise you have gained in the marketing and practice of Legacy Leadership® to shadow a colleague who is just starting out. You can:

- share with them generally what marketing strategies are more/less effective from personal experience
- assist them in defining an effective marketing strategy (from their vision) for their "dream clients"
- walk with them through their market/client qualification process
- partner with them in a public Institute or with a corporate client, which will result in their experiencing successful integration of the Model and business success much sooner than if they have to find their way on their own

There are two kinds of mentorships: volunteer and fee for service. Currently, some Legacy Leadership® facilitators offer some hours of complimentary mentoring as new Legacy Leaders® start integrating Legacy Leadership® into their businesses and begin crafting their own personal visions and strategies. After this, if both parties desire it, there can be a fee for service relationship. This could be:

- an hourly fee
- a share of the profits from future business
- an arrangement for sharing of the business
- co-facilitation of a public or corporate Institute
- sharing coaching of clients within an organization

Whatever the arrangement, we recommend that you be clear, with yourself and those you are mentoring, about what arrangement would best suit you both. As the Legacy Community grows, the precedents we set now regarding leaders developing leaders in a generous yet business-like way will serve the whole community in an intentional, consistent and professional way.

As a mentor how will you be there for all the steps of the process, providing support, appropriate challenges and a good ear as your Legacy Leadership® colleague finds his or her way to their Big Hairy Audacious Goal?

Peer Mentoring: Talk regularly with others in the Legacy Community and in your business community to reap the benefit of diverse skills, experiences, resources and points of view (styles and perspectives). A Legacy Leadership® Tele-Community is currently in development and will be a wonderful venue for this conversation.

Take a few moments to answer the questions on the following page. What you write here will help you develop a promotional plan which will be very useful in your overall marketing strategy.

A Word About Advertising

Given the position of Legacy Leadership® in the product life cycle (Introduction/very early Growth) advertising is not generally recommended at this time, with the exception of “soft ads” which are technically more like announcements, in places like e-zines, business journal calendars, web sites etc.

It has been the experience of those successfully marketing LL to date, that the most effective marketing and sales strategies are personal ones—our market has not yet extended beyond one degree of separation from the Legacy Leader® (you!). This means that the potential clients most highly attracted to Legacy Leadership® are attracted to what they see modeled, which is difficult to portray on paper. Personal, experiential relationship appears to be a key selling feature—benefits that the client can see, hear and feel simply by being in conversation with you or someone who knows and respects you.

Advertising is expensive and requires a certain amount of brand recognition to be effective. Legacy Leadership® is currently in the place where successful marketing tends to be more highly relationship oriented. Over time this marketing and sales strategy will change somewhat as Legacy Leadership® gains more brand recognition in the business community. Even then, one-to-one relationships will ALWAYS be critical to a successful sales process for Legacy Leadership®.

YOU: The Human Advertisement

You are the best possible advertisement for Legacy Leadership® in the way you conduct your own business and life. This will be the true essence of “attraction marketing.”

To enhance your presentation, CoachWorks® now has a variety of Legacy Leadership® clothing items and gift items. If you are sporting a Legacy Leadership® shirt or vest, have your “elevator presentation” at the ready!

You may choose to have business card draws for LL gift items at your networking or trade show events or give them as gifts to special customers. These items can help keep Legacy Leadership® in their “line of sight.”

BP3b

An Influencer of Leadership has an excellent working knowledge of cutting edge leadership technologies, models, styles and languages.

—The Legacy Leadership® Field Guide

Facts Tell, Stories Sell

Being able to tell a good story to illustrate the concepts of Legacy Leadership® will be one of your most useful and productive marketing tools. Whether the story is one of your own experiences, or of someone you know, or just a retelling of something you read, build a resource of good and well-told stories that highlight the benefits and foundations of Legacy Leadership®. We have included an article here by Richard Littlemore entitled “Long Story Short” which beautifully relates the importance of having a story to tell. Perhaps this story will inspire your own library of stories to tell.

Promotional Opportunities Worksheet

Put the following in order by your preference and abilities, along with any comments you might have about each one:

Order	Promotional Opportunity	Comments
	Public Speaking	
	Networking	
	Writing	
	Exhibits/Trade Shows	
	Personal, one-on-one communication	
	Direct Mail	
	Other (specify)	

What other promotional opportunities can you think of?

Who will you partner with?

Potential Partner Name	Business Type, Skills, Competencies (what do you know about them?)	Comments

Long Story, Short

Step aside consultants, accountants, system administrators … here comes the company storyteller.

Richard Littlemore
*From the December 2002 issue of **BCBusiness** Magazine*

Here's the premise:
In a world awash with data, in an age when we are besieged by knowledge but bereft of meaning, our only hope of gaining understanding is to reduce life's riddles to a narrative, a story. Think about it. Without a story, without order and plot – an introduction, a set-up, a climax and a conclusion – there is only chaos; the world is nothing more than a vast library with no catalogue, no Dewey decimal system, no thread of sense.

This notion isn't new. Every freshly scrubbed optimist who ever sold encyclopedias or vacuums knows that once his foot wedges itself in the door, he's nowhere without a story – a fast patter to sell a pocketful of dreams. But the importance of 'story' in the modern business context goes well beyond the usefulness of a sales pitch. Whether you are setting out a corporate vision or retreading your public reputation, whether you are talking to the media or to your employees, your bank, your customers or your shareholders, you need a story. That much is obvious.

Two further points are less so. First, in addition to the stories we create for ourselves, we also have useful access to everyone else's stories, dating back to the beginning of time. We have recourse to the knowledge and wisdom buried in our entire literary cannon. From *The Bible* to Stephen Covey, the literal library is stocked with stories whose applications are more varied – and more essential – than we have previously understood. The second point, and this is most relevant to those who would count themselves as leaders, is that having the right story is only half the key to successful storytelling. The other half is performance. Neglect the presentation and you sabotage the value of the message.

All this might be no more than ripe fodder for a masters thesis were it not for the fact that big business has started spending big dollars to incorporate all these aspects of 'story'. Organizations as diverse as Boeing and the Columbia Medical School have engaged poets (Boeing hired David Whyte; Columbia, Michael Ondaatje) to work with their top talent, to help them find meaning and understanding in what they do. Locally, Intrawest has built alliances with professional 'storytellers' of another sort. It hired West Vancouver's Envisioning and Storytelling Inc. to construct new 'storylines' to suit and to sell each of its international resort properties. Top-tier international consultants such as Richard Olivier are also breaking through with 'story', taking their literate and literary messages to the boardrooms of clients such as The Royal Bank of Scotland, Deutsche Bank, Peugeot, PriceWaterhouse Coopers, British Airways and Glaxo Wellcome. The story 'story' is starting to sell.

For Mary Pat Barry, once the Director of Internal Communications at Telus, the acceptance of this link between story and business was inevitable. From the beginning there could be no commerce without communication; it was just a matter of waiting 'til the message caught up to the media. From the beginning of time "[storytelling] is how we grew knowledge and shared perspective," Barry says. "It's how we became a community." All our social and religious traditions blossomed and grew in a storytelling context that was, until the 15th century, predominantly oral. That tradition hit a bump with Gutenberg. While the printed word extended the potential for human connection, it also compromised the social nature of communication. Unlike oral storytelling, the printed word has no body language, no inflection, and the writer gets no immediate feedback. Thus began the dislocation between storytellers and their audiences – a disconnect that became worse with film and television and worse yet with the Internet.

"I believe we need the oral aspect – the storytelling – to aid in understanding," says Barry. So she went about re-establishing it at Telus. First, she changed her title to Transformational Storyteller. By doing so, she hoped to change her personal paradigm from in-house spin-doctor – "a one-way blow-horn" – to a conduit through which Telus employees would be willing to share their stories and find a true sense of community. Now, rather than just peddling the company line, "I'm trying to provoke thoughtful, stimulating discussion."

Ironically, even as Barry lays some of the blame for the communication breakdown at the feet of technology, she has used technology aggressively to overcome the problem. For example, CEO Darren Entwistle, who says he is "hugely supportive" of Barry's initiatives, has instituted a weekly e-letter to employees with a *CEO@telus.com* feedback loop that Barry monitors and charts, plotting the importance of particular issues to employees. The company is also starting an internal TV station, a Telus newsnet that ultimately will be available on every desktop in the organization and will feature everything from a tickertape showing the stock price to stories about Telus employees, complete with footage gathered by a huge number of volunteer camcorder operators.

Paul Smith of Envisioning and Storytelling (E&S) says that such discussion is a necessary starting point in establishing a company's story. And only if you can agree on the important elements of a story and share it effectively – within the company and with the outside world – will you approach your potential. Smith's firm leads companies, or divisions of companies, through the discussion process, beginning with a two-day 'envisioning' session in which everyone in the management loop shares their views and, ultimately, binds themselves to one common story. ("Unless everyone agrees, they all go away and speak a different language," and the story collapses like the crash of Babel, Smith says.) The E&S team leader then writes the story down, creating a storyline that can be shared with all staff and – where applicable – form the backbone of a marketing or public relations campaign. Such a campaign can be one element of a third stage in which E&S will work on execution – helping the company realize the vision outlined in the story.

Led by its biggest client, Intrawest, E&S has specialized in resort stories, with corporate clients like Intrawest and the Four Seasons group, and with resort municipalities, such as Whistler and Aspen/ Snowmass. “Resorts are so huge, so complex and have so many layers that without a storyline you can’t get everyone to agree even on what the experience should be, much less on how to deliver it,” Smith says. As it is, by the time Intrawest launches any new resort development, “you’re not buying a commodity, you’re buying a story.”

For Barry and Smith, the story is the goal, the result. They facilitate the creation and/or sharing of personal and corporate stories. Listening to someone like Richard Olivier, however, you begin to see the story not as a product, but as a tool. Olivier’s specialty is to search an existing story for a message that is timeless, as relevant today as when the story was conceived. There are and always have been patterns in life that affect human behaviour, Olivier says, “and every once in a while a genius comes along, like Shakespeare or (Carl) Jung, who recognizes what those patterns are.” Shucking off the modern obsession with being up-to-date, with the notion that “things have to be fresh to be true,” Olivier says, “I find it interesting to look back 400 years and see what is still true.”

Following gingerly in the footsteps of his famous father, Laurence, Olivier looked to Shakespeare for inspiration – and found a rich vein of such ‘truth’. Through his London consulting firm, Olivier Mythodrama Associates, he now offers a series of workshops that draw leadership lessons from Shakespeare’s best plays. His first topic was Inspirational Leadership with *Henry V*, from which he has offered two workshops in Vancouver in the last year. He is also adding Emotional and Political Intelligence with *Julius Caesar* (“or how not to get stabbed in the back”), Leading at the Edge with *Hamlet*, (“staying sane when everyone around you is going crazy”) and, most recently, The Art of Leading Change with *The Tempest* (“you have to change yourself first”).

He is not alone in finding strength in the wisdom of ages. Alasdair Smith, a human resources consultant at the Credit Union Central of B.C., has looked to an even older text – the Old Testament – and come up with a story he has found perfectly applicable to modern-day business. Smith’s guide to this discovery was the American consultant, speaker and author William Bridges whose book *Managing Transitions: Making the Most of Change* suggested that changes come in three pieces: an ending; a neutral zone; and a new beginning. Later, Bridges pointed out that the pattern is perfectly illustrated by the Old Testament story of the Israelites’ flight from Egypt: they are separated by the Red Sea; isolated in the wilderness for 40 years; and finally find the Promised Land. Smith, who is working on a master’s degree at the Vancouver School of Theology, says that whenever he shares that story with someone in transition – with someone who has lost his or her job or has been affected by one of the many recent mergers in the credit union system – they immediately comprehend the meaning. And if they feel that they are 'in the wilderness', they come to understand that it's normal – an inevitable step in transition. It may not improve their situation, but it gives them context and, therefore, a certain amount of peace, Smith says.

Peter Frost, the Edgar Kaiser Professor of Organizational Behaviour in UBC's faculty of commerce and business administration, says this is an example of the stories that give us all context. Such stories give us strength, nurture loyalty or, like the fiction around the *Wizard of Oz*, "hold us in place," Frost says. If there are corporate taboos, for example, there often will be cautionary tales about the dire consequences suffered by those who have broken those rules in the past. These tales become part of an organization's whole story. More than just a vision or a strategy, that story reflects the whole of the corporate culture, good or bad.

Parables – stories of example – also have another use, says Peter Rees, an Investors Group advisor and manager with an interest in corporate storytelling. If people share common stories, they can identify common traits. Then they can complain about those traits by criticizing the characters in a fiction. This allows people to have productive conversations with their workmates without getting into a direct dispute, Rees says. "Don't you hate it when …?" is usually a more productive comment than: "Boy, you drive me crazy when …?"

The last, and for leaders often most important, element of story is performance – delivery or presentation, if you prefer. Olivier, for example, coaches leadership trainees on the importance of their mien and demeanour when they are trying to inspire the troops. Drawing from a section of *Henry V* in which Henry's troops are vastly outnumbered and outgunned by the French forces, Olivier says it would do no good to stand before the multitudes, slump-shouldered, and share your deepest fears – "we're all going to die." There is a time to put on a brave face and if it is to be done, it should be done convincingly, he says.

Peter Frost says there is an element of both content and presentation in this category. "You have to pay attention to the power of words in framing choices," he says, adding, "Imagine if Martin Luther King had said: 'I have an idea.' " Frost also points to the performance of U.S. presidents for examples of both good (or bad) story and good (or bad) presentation. Casting back to the days when U.S. troops crashed in the Middle Eastern desert in an aborted attempt to rescue hostages in Iran, Frost points out the devastating effect of then-president Jimmy Carter's willingness to stand up publicly and accept responsibility for the failure – Carter was rushed from power. On the other hand, Frost points to Ronald Reagan who, in a reassuring response to the explosion of the space shuttle Challenger, stood up and, quoting John Magee, Jr., said that the astronauts had slipped the surly bonds of Earth to "touch the face of God." One could argue that presidential pressure to proceed was as much at fault in both accidents, but the resulting effects on presidential fortunes were much different.

In the category of pure presentation – of acting – business leaders also have lessons to learn. Yet conservative businesspeople who would never consider submitting a letter marred by a typo or a messy correction – people who care about presentation – are sometimes suspicious of taking acting advice for fear of being criticized for insincerity. Christopher Gaze, artistic director and founder of Bard on the Beach, has found at least one corporate group that understands the importance of demeanour. Gaze has used his skills as a director to coach one of the Bard's major sponsors, the lawyers of Lawson Lundell. This is not trickery, he says. It is both possible and advantageous to use acting and dramatic skills to make presentations lively, interesting – even important. Gaze credits his own communication and presentation skills for his success, on the stage and off. "If you are going to encourage others, you must allow yourself to think and look like a leader." From the boardroom to the stage, "an individual with a fine sense of communication and dramatic skills can act in a way that is much more potent," Gaze says. "If you can introduce your ideas in an engaging way, you are more likely to prevail."

This gift of presentation – at least as evinced by Vancouver Symphony Orchestra director Bramwell Tovey – captured the attention of another business school professor, McGill University's Henry Mintzberg. Mintzberg was doing a series of articles in the *Harvard Business Review* on leaders and leadership values. He chose to follow Tovey around to try to gain some understanding of how the literal 'conductor' leads an impassioned group of professionals. In the piece, Mintzberg says he was particularly taken with what Tovey calls his "covert leadership style – unostentatious and unobtrusive."

Tovey, however, dismisses much of the stress on his performance skills in favour of going back to the fundamentals; he's advertising the product, rather than the story. It's true, he says, that passion brings the professionals to his organization and that presentation is a vital part of their function. "But passion alone cannot sustain energy. It's part of the artillery at concert time, but most music-making takes place in rehearsal and most planning takes place in dull offices where displays of passion would be highly inappropriate."

Tovey is thrilled at the attention, delighted when he is invited to speak in the role of business consultant. But he concludes that he and other much-in-demand arts executives, such as Christopher Gaze, bring value that is not theatrical but technical. "Most arts organizations are extremely well run. Really, we run with no resources and must be all things to all people. We must justify ourselves to the public and our boards and we do all this in a way that is very efficient, with very little waste." All of which is surely the gospel truth, and in any case an excellent storyline – one to which the members of his orchestra would undoubtedly agree. It also speaks to one of the fundamental truths of great stories – from the Jews' triumphant arrival in Israel to Henry V's troops prevailing over the French forces at Agincourt – everybody likes a happy ending.

Richard Littlemore is a journalist, corporate consultant and speechwriter and believes that no well-dressed man goes anywhere without a story.

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Section 5:
Market Differences and Marketing to Differences

Application of Best Practice 4

What are the Differences, and What Makes the Difference?
You will find a variety of ways in which people approach the market, and respond to it. These will include unique styles, communication strategies and programs (from the vendor) and stages of readiness (from the customer). It is helpful to keep in mind the differences, and how those differences can work best for you.

Different and/or Unique Markets
Where do all the different possibilities for delivery of Legacy Leadership® fit within the greater community of interest in leadership development?

What are the different markets?
- Corporate
- Public
- Church
- Youth
- Children
- Individual Coaching clients
- Other?

What are the different methods for marketing/selling to these audiences?
- Paper
- E-mail
- Telephone
- One-on-one personal visits
- Conferences and Exhibits
- Networking events
- Advertising
- Other?

BP4a

An Advocator of Differences:

- **Seeks to discover how others see the world and individual situations.**
- **Is curious about differences, and truly desires to learn more about them.**
- **Reframes how they think and how they approach people who are "different" from themselves.**

—The Legacy Leadership® Field Guide

Questions to assist in further clarifying market and right actions:
- What is generic and applicable to all, with some modification?
- Where is customization required?
- What stage of readiness are prospects relative to the benefits of LL?
- What is their Style? (using the PCSI for marketing)
- Other?

Engaging in the conversation to respond to expressed desires establishes a strong relational connection.

Different and/or Unique Stages of Readiness

It will be vital to your successful marketing and sales strategies to qualify the "stage of readiness" of your potential clients for Legacy Leadership®, among other buying influences.

James O. Prochaska and a team from the University of Rhode Island developed the Staged (Transtheoretical) Model of Change[1] that describes five "Stages of Change" that people experience as they work to incorporate new behaviors and discard old ones. We have adapted this Staged Model of Change to the readiness differences you might expect when marketing Legacy Leadership®.

Attention to observing and acknowledging the stage of readiness of potential clients to the concepts and behaviors required for effective practice of the Legacy Leadership® model will:

- greatly enhance successful connection with those on the cusp of readiness
- assist in assessing who is not ready and the likelihood of when they may be (if ever)
- provide guidance, with a well-researched process, for response and intervention at any Stage, creating a space for the person to move to the next stage

The Five Stages

STAGE	Characteristics	Relevance to Legacy Leadership®
1 **Precontemplation** (not thinking about it)	An idea may be recognized, but individuals have no intention of making any behavior change, at least with the next 6 months (research shows that those at this stage may stay there for an average of 2 years). Reluctance or resistance to change are the hallmarks of Pre-contemplation. The person (organization) may be unaware of a need for change.	**Not ready to consider Legacy Leadership®** – pretty entrenched in the ways of current management strategies. This Stage is characterized by the "Four R's:" reluctance, rebellion, resignation and rationalization. Anything perceived as persuasion will cause either resistance, defensiveness or digging in. They may be receptive to receiving information – increasing awareness of potential pros of change - but that is all! This group will often be found as a large percentage of any public audience and a fairly high percentage of main stream organizations. Remember –the average length of time in this stage after a new idea has been presented (unsolicited) is two years.

[1] ***Changing for Good,*** Prochaska, James O., Norcross, John C. & DiClemente, Carlo C., Avon Books, NY, NY, 1994 http://www.uri.edu/research/cprc/TTM/summaryoverview.htm

Section 5: Marketing Differences *(continued)*

STAGE	Characteristics	Relevance to Legacy Leadership®
2 **Contemplation** *(thinking about it)*	Individuals are aware of a need to change. They have not yet made, but are considering, a commitment to take action in the foreseeable future (6 months).	**May be willing to think about Legacy Leadership®** as a resolution to leadership challenges. Effective interventions are written/verbal information about the model, and conversation (especially probing questions which encourage them to think more deeply about the model). Encouragement, “You can do it” messages. Give them time to think. People in this stage will likely not come to an Institute for 6 months to a year. If it is a corporate client, it may take this same amount of time to gain commitment.
3 **Preparation** *(getting ready to do it)*	Individuals in this stage are intending to take action in the near future (30-60 days) and are actively gathering tools and resources.	These folks are getting ready – **they are within 30 days of saying yes to Legacy Leadership®.** These may be people who have used and integrated other leadership models (see Comparison chart) and are ready to take action. Some preparation time is required, either logistically or mentally and, if this person is within an organization, they may be your liaison to others who need to say yes. If this is a personal decision, other influences may be pertinent, such as time, money, or logistical arrangements that take time to set up. Now is the time to make realistic plans and identify resources. This is when people actually seek/attend action-focused education programs. They are ready to learn. These could well be leads, referred by other people, who are eager to talk with you. **Case studies** or **personal testimonials** are effective in this stage. Commitment to attend an Institute (registering) or, if organizational, preparing and signing a contract, reinforces intention and commitment to action.
4 **Action** *(doing it)*	This is the stage where individuals actually try out new behaviors that are part of a new way of being.	**You are now at the Institute, or in the organization**, and actively facilitating the learning of Legacy Leadership® Practices; the actual trying out of the new behaviors occurs at this time. Performance Mastery (successful practice) is critical to successful change. Action, with active support from you, usually lasts about six months before a person is considered to be in Maintenance. This is the critical time period to practice internal support and, in a way, marketing of next opportunities for your client. Without consistent support, reinforcement, and encouragement, it is very easy for the new Legacy Leader® *to go back to what they were doing*. All these new and valuable learnings will be for naught if not actively reinforced. There is a school of thought that if a newly learned concept is not reinforced and anchored within 48 hours, it may as well never have been learned at all. This speaks to the critical value of coaching these behaviors into assimilation. The LLCI, and the Legacy Leadership® Focus Workbook will be a wonderful tools to provide a structure for this relationship. Have a plan to keep connected, with phone calls, coaching/mentoring appointments, and an action learning project which will keep your client actively engaged in integrating the *Best Practices* into their business practices.

Section 5: Marketing Differences *(continued)*

STAGE	Characteristics	Relevance to Legacy Leadership®
5 **Maintenance** *(continuing new behaviors effectively for more than 6 months)*	This is the continuation of change—an active period that must be geared to prevent relapse. Change terminates only when the behavior is a part of consistent activities, beliefs and values.	**This is still an active change period**, at a deeper and more evolved level of integration. The changes in leadership practice are more internalized now, creating an opportunity for fine tuning or extending the scope of practice. Reinforcement, support and service continue to be important at this stage, both to prevent relapse and to capture readiness for the next level of learning about Legacy Leadership®. This is also your testimonial group who may actively help you market and sell Legacy Leadership® and/or provide you with an extended market within their networks or organizations. You will be best served in your marketing and sales activities if you clearly identify where your potential clients are, regarding readiness for Legacy Leadership®.

Successful marketing is moving with your client through the stages, and right relationship with timing expectations will be critical to keep top priority in your planning. Successful "Stage-appropriate" responses and interventions will facilitate change more efficiently and effectively. You can invite your market along only one stage at a time. Know your market and then choose the right message and action.

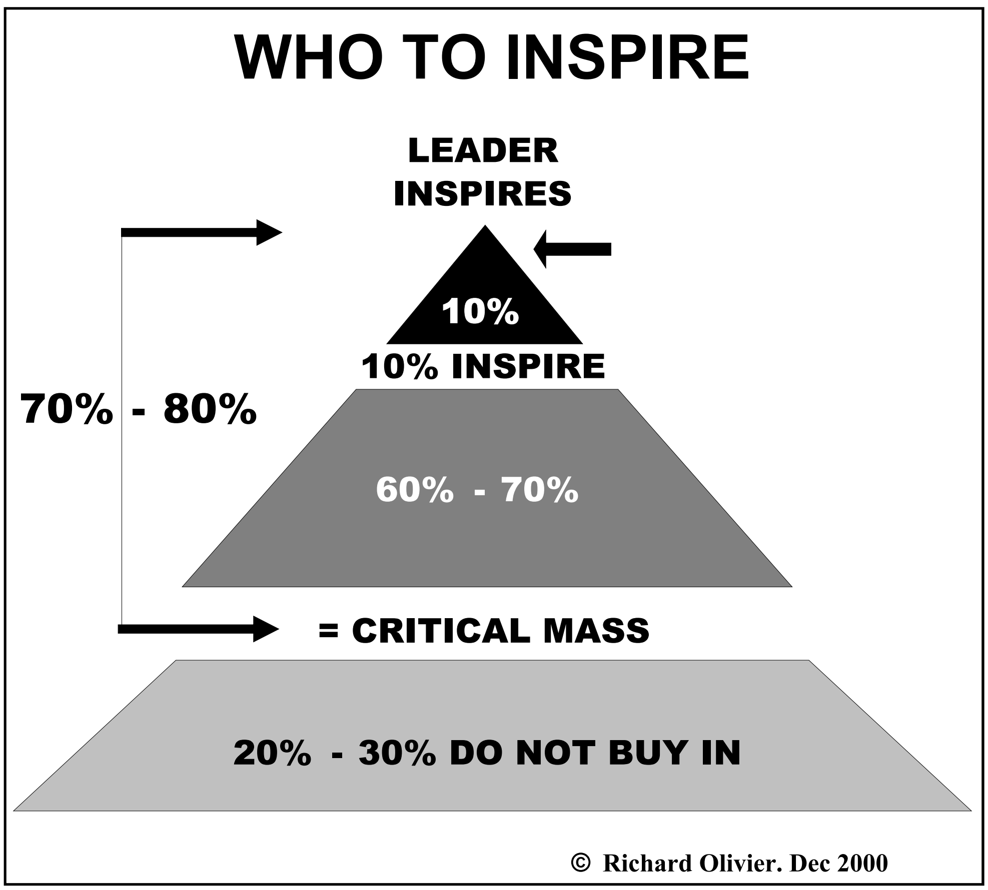
Inspire Smarter, Not Harder

In Richard Olivier's "*Inspirational Leadership, Henry V and the Muse of Fire, Timeless insights from Shakespeare's Greatest Leader,*" the author provides a model and some guidance for effective expenditure of our leadership (and marketing) energies. Olivier says,

> *"A wise leader will focus on personally inspiring some 10% of all the people he or she needs to be committed to a project (or program). If 100 people can be involved, focus on 10 of them. But not just any 10, the 10 who have the most authority with the other 90 – the 10% others will most likely listen to. If we carefully select and successfully motivate these 10, each of them will, on average, motivate six or seven others…. Our initial 10 + their six or seven gives us 70 – 80%, or critical mass, to move the project (vision) forward –at least to the next step."*

This is a very worthwhile exercise in assisting you to identify the 10% who are actually available to hear and respond to what **you** are offering. The next 60-70% can be influenced by your 10% and perhaps, most important to remember is that there are always 20%-30% who won't buy in no matter what you say and do – they are not ready! There is currently a large mainstream market not ready for the concept, the philosophy or the practice of Legacy Leadership®. This is neither right nor wrong –it is simply a reality to keep in mind.

We have provided four pages of worksheets for you to delineate who you will inspire. Who are your potential clients? Who do you know personally? Of this 100, which 10 do you have the most influence with? Who do they have influence with? Who would you like to know? Who knows someone you would like to know? This is a little time consuming, but very eye opening and revealing about your potential choices for inspiration. We recommend you take the time to do this exercise.



Top 100 List Worksheet

In Column A, List 100 people you know—those likely to be associated with your business ventures and especially with Legacy Leadership® marketing. After listing your top 100, put a check mark in Column B for your top 10 only, then complete columns C, D and E for those selected top 10 of your list

A Name	**B** Those With Whom you Have the Most Influence (Top 10) (check mark here)	**C** With whom does this person have the most influence?	**D** Does this person know someone you would like to know? Who?	**E** Who else would you like to know better, and who knows them?
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Top 100 List Worksheet continued

A Name	**B** Those With Whom you Have the Most Influence (Top 10) (check mark here)	**C** With whom does this person have the most influence?	**D** Does this person know someone you would like to know? Who?	**E** Who else would you like to know better, and who knows them?
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Top 100 List Worksheet continued

A Name	B Those With Whom you Have the Most Influence (Top 10) (check mark here)	C With whom does this person have the most influence?	D Does this person know someone you would like to know? Who?	E Who else would you like to know better, and who knows them?
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Top 100 List Worksheet continued

A **Name**	**B** Those With Whom you Have the Most Influence (Top 10) (check mark here)	**C** **With whom does this person have the most influence?**	**D** **Does this person know someone you would like to know? Who?**	**E** **Who else would you like to know better, and who knows them?**
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(Phew!)

Different and Unique Styles

Refer to the PCSI (Personal Coaching Styles Inventory©) for details on communicating most effectively with each of the styles presented there. Then factor in your own strengths and get a style partner!

Prospecting and Qualifying

Now comes the work of prospecting and qualifying. Prospecting for clients has been likened to prospecting for gold – separating the gold from the gravel. Prospectors of gold "moiled," which is defined as drudgery, hard work. There is, unquestionably, some drudgery involved in marketing – especially a unique, fairly new, and clearly specialized product such as Legacy Leadership®. The following provides some helpful information to reduce the drudgery of prospecting and marketing in general.

Always Prospect from Your Vision and Values

Keep your vision in mind, and always work in alignment with your values. Qualify your market based on your vision and values.

Prospect as an Expert

Continue becoming a "student of leadership" and eventually you may be perceived as an expert, as noted earlier. Keep learning and looking for new insights on leadership and the human condition.

> **A vision without a task is but a dream.**
> **A task without a vision is drudgery.**
> **A vision with a task is the hope of the world.**
>
> *—Church Inscription, Sussex, England 1730*

Expect the Possibility of NO

An early step in qualifying is first ***disqualifying***, and the key is to invite and allow prospects to disqualify themselves. As you test market with messages to a wide audience in your network at the beginning (through e-mail or in conversation with those you are meeting with anyway for other reasons –some way that will not add time or expense) listen for language and look for behavior (individually or organizationally) that is either in alignment with Legacy Leadership®, or, more importantly at the beginning, is not.

After a short introduction (your elevator or airplane presentation, depending on the circumstance) listen for **NO**. This will come fairly readily from those in some of the stages of readiness covered above. Being prepared to hear **NO** is effective for several reasons:

- If the client is NOT READY, you can discern this quickly and get on with sharing other areas of common interest, keeping the relationship healthy and vibrant. It may be that you are speaking with a pre-contemplator, and are planting a seed which will sprout and grow over time. Whatever the case, now is not the time.
- When you are open to **NO**, your prospect can hear it and feel it, and it makes it safe for them to say what is true for them. How many times have you said yes to someone or something simply because you didn't know how to graciously say that it wasn't right for you, or you didn't want to hurt the person's feelings? These

societal pressures don't serve us and you can do yourself and your prospect a great favor by leaving the space open for them to disqualify themselves at this time.

- When you are open to **NO**, there is nothing for your prospect to resist. Your genuine curiosity as to the "rightness" of Legacy Leadership® for this person at this time will open a space for safe exploration and probing for information that will actually allow them to reflect and come to an informed decision in a timely way.

- **NO** may mean, "no this is not for me AND I know others for whom this might be of interest." It is very valuable to make this distinction explicit and then leverage that one degree of separation. It also customizes how you communicate with this person and what materials and information you provide them after this point.

This strategy provides a gracious way for potential clients to "self-select"—choose in or choose out—either choice being acceptable. This leaves the relationship between you positive, and the door open for future conversation about Legacy Leadership®.

NOTE: A Qualifier About Qualifying
After qualifying clients as best you can with your understanding of states of readiness and alignment with Legacy philosophy and values, BE a Legacy Leader and PREPARE TO BE SURPRISED. It only takes one (or even better, two) people in an organization to "get it." If they are rightly placed (as in able to say yes even if others say no) amazing things can happen. Legacy Leadership® has "caught" into some organizations already that might have seemed unlikely candidates in a qualifying exercise.

Marketing to and Supporting Current Customers
Bearing in mind that it is five times the expense to gain a new client than to keep (and please) an existing one, be sure to factor into your overall plan the percentage of time you will dedicate, and the ways in which you will stay connected with, current clients. What other programs and services can you offer them to keep them engaged and growing as Legacy Leaders®?

Technical Assistance Research Programs Inc., a Washington, DC-based consulting firm says, *"...68% of customers who take their business elsewhere do so because they believe that a company doesn't care about them as a customer"* One way to head off problems, or slippage of attention and learning behavior change, is to plan to make follow-up calls immediately after your program or service is complete.

Quick communication, and thanking them for their business and commitment to the spirit of Legacy Leadership® is the key: This could be:

- a phone call
- a personal visit or lunch, if possible
- a bouquet of flowers, if appropriate
- a Legacy logo-ed gift
- one of those timely postcards!

Different and Unique Programs

Remember, when you "sell" Legacy Leadership®, you have a wealth of options for programs and materials. Here is a sampling of the kinds of services you can bring either into an organization, or to individual clients.

Corporate

- One-, Two-, and Three-day program designs
- Custom design (modular, relevant and tailored to existing needs/challenges, etc.)
- LLCI Measurement for individuals and teams
- PCSI (Styles Inventory for teams, etc.)
- 360 Feedback Service (online assessment service, see CoachWorks® website)
- Coaching (external and internal, with external or internal management)
- Legacy Leadership® TeleClass

Public

- Legacy Leadership® Institute/ Practitioner Certification
- Legacy Leadership® Institute/Facilitator Certification
- Legacy Leadership® Train the Trainer
- LLCI Measurement of self competencies as they relate to Legacy Leadership®
- PCSI (Styles inventory for better self assessment and positioning with others)
- 360 Feedback Service (online assessment service, see CoachWorks® website)
- Mentoring
- Coaching against the Legacy Leadership® model
- "Just Give Me 5™" - Legacy Leadership for Kids™ (custom designs)
- Legacy Leadership® TeleClass

BP4b

An Advocator of Community:

- **Unites differences into community process.**
- **Desires to embrace and incorporate diversity in all activities.**
- **Demonstrates excellent, consistent and clear communication.**
- **Understands the strength afforded in differences.**
- **Knows that as one grows and succeeds, ALL do.**

—The Legacy Leadership® Field Guide

For a more complete listing of services and materials, visit the CoachWorks® International website, and especially the webstore. Level 1, 2 and 3 certified personnel will enter through either "Door 2" or "Door 3." The General Public is also invited to visit the store, but will have a very limited selection of materials at a higher cost. You are welcome to invite your clients to visit this part of the webstore. (Note, there is a Door 4 for certified Legacy Leadership for Educators materials.)

Be creative! Create unique and different opportunities to use the CoachWorks® Legacy Leadership® materials to meet the unique needs of your clients. Add your services to those listed above. Design your own programs in partnership with your client(s).

Section 6:
Calibrating Your Marketing

Application of Best Practice 5

Milestones, Check Points and Navigational Corrections—It Begins with You
Practice Legacy Leadership® in your own life and model LL in everything you do – this is the ultimate advertisement and attractor! The ultimate calibrator is to stop periodically and spontaneously to evaluate your leadership language, demeanor, and behaviors. Do you have a coach who is working with you and your LLCI? Have you identified your growing edges and do you have a measurable plan to develop them?

Use this listing to measure your marketing elements:

BP5a

A Calibrator of Responsibility will focus on what went right and what can be done differently, instead of what went wrong.

—The Legacy Leadership® Field Guide

Conduction
- ☐ E-mail announcements
- ☐ Promotional Materials
- ☐ Invitations
- ☐ Trade show/ conference/ networking event flyer and biz card distribution

Connection
- ☐ Immediate telephone follow-up
- ☐ Make face to face appointment if possible
- ☐ Agree on mutually convenient phone date or live date

Conversation
- ☐ Have open ended, curious, intentional questions ready (designed to get to the leadership opportunities and issues)
- ☐ Listen for Legacy language, look for implicit Legacy practices
- ☐ Build on what's already working –good to great rather than gaps
- ☐ Look for the Legacy "doorway" (which BP is most evident, and/or growing?)
- ☐ Make links between what's working and the opportunity for more powerful individual/ company performance through inspirational and influential leadership
- ☐ Ask direct questions and be prepared for NO early on – qualify and encourage the client(s) to qualify or disqualify themselves

Commitment
- ☐ Define opportune times to ask for commitment (their first demonstration of BP 1 – direction and commitment)
- ☐ Have options for "best opportunity" participation – Institute. Tele-Class, custom organizational program
- ☐ Have early bird savings for public programs for the cost conscious
- ☐ Ask directly for commitment

Section 6: Calibrating Your Marketing *(continued)*

Carefully consider the answers to the following questions as you become responsible, and hold yourself accountable, for calibrating your marketing efforts.

Responsibility and Accountability

- ☐ Do you have a comprehensive business plan & marketing plan with an itemized plan of action?
- ☐ What are you taking responsibility for in the marketing of your programs / services?
- ☐ Do you have someone who is co-marketing with you. Are you clear on roles and responsibilities?
- ☐ What is CoachWorks® responsible for; i.e. are you clear on the materials resources available to you and how you can get them modified or customized for your particular market?
- ☐ Do you know what the lead time for ordering materials is?
- ☐ Who are you accountable to? A partner, a venue, an organization, a coach/mentor?

Milestones and Measurements (Calibrations)

- ☐ What is your timeline from first message to ideal contract or intended program delivery?
- ☐ What are your milestones—time between conduction to connection to commitment—and can you predict the movement of your prospects from stage to stage?
- ☐ Do you have at least four contacts planned with your dream clients? What are they (e-mail, telephone, personal appointments) When are they?
- ☐ Do you have a contract template created and at the ready?
- ☐ Do have an easy / accessible registration process for your program?
- ☐ Do you have LLCIs and PCSIs on hand for use with clients? These can serve as a soft introduction to the benefits of Legacy Leadership® elements and used individually as an assist in relationship building, supporting a potential later and greater commitment.
- ☐ Which promotions worked for you and which did not? This is crucial for development of future promotional resources and efforts.
- ☐ What is your market research process? Personal; probing the Legacy Community; a university class which may co-research with you, etc.

- ☐ What programs and services can you offer clients or Institute graduates to keep them engaged and growing as Legacy Leaders?

- ☐ Do you have a process for measuring response to your marketing materials? What is it?

- ☐ Do you have a process for measuring the success of your sales strategies, i.e. keeping a record of how many people you contact, the length of time spent in conversation and relationship building, general time to registration or contract; % of sales to total contacts, etc.? What is this process?

This is a cursory list designed to get you thinking about what and how to evaluate your Marketing plan and process. Obviously, each individual will have different checklists, milestones and calibration points. Consider your personal methods of calibrating your marketing efforts, your personal list of milestones, and your personal process of recourse correction. You might even try developing your own worksheet and process checklist to keep track of your calibrations.

Finally, if marketing is not an area of expertise for you, consider hiring a marketing consultant to work through evaluation methods with you. Nobody has all the answers AND, with the proper connections, you can find most of them.

BP5

A Calibrator of Responsibility and Accountability will plan for making adjustments in standards of behavior as a result of new information or changes, but will never compromise vision or values.

—The Legacy Leadership® Field Guide

Section 7:
Specialized Marketing

Internal Marketing

This section is intended for those people already employed or contracted within an organization. It is not a guide to selling Legacy Leadership TO an organization, but for promoting its adoption WITHIN your organization. This section will include material already found in this marketing manual, but is included here as a reminder for those doing internal marketing.

Internal marketing within an organization has its own set of unique challenges and processes. However, internal marketing, by the internal person, is **very much like marketing for the external coach/consultant** in that you follow some basic strategies:

- Use the same positioning tools (Note: If you are working in tandem with an external coach, you have a partner in identifying needs, position, and product knowledge.)

- Know your own vision, be clear about what you want and be able to identify a need for it in the organization. Even if a "need" is known, the real question is "do they have a compelling desire for it?"

- Do your research and know the available resources (other leadership programs and models, as well as your business requirements). Know your ideal, and become a student of leadership. Keep up on current trends, and how Legacy Leadership® is a framework, comprehensive enough to incorporate every trend out there.

- Know the value proposition for such an initiative.

- Be a model. You will be leading by example much of the time. Be sure you have studied Legacy Leadership® and are living your legacy every day. BE a Legacy Leader®.

- Perhaps you are already a coach. Be sure your coaching reflects the Legacy Leadership® Model, and your skills as a coach are polished and current!

- Know what might keep the organization/company from achieving desired results, and aggressively work to eliminate those obstacles.

The Unique Features of Internal Marketing

- As the internal coach/sponsor, you know the context of your organization—its needs and acceptance levels, as well as the people. You also know what is expected as a return on investment (ROI). It will be necessary for you to establish measurements and milestones. (While this is present somewhat in external marketing, it is imperative in internal marketing.)

- You know more about possible senior sponsors (those within the organization who also see the need for leadership development and can make the commitments of resources. It is critical that these sponsors are selected AND developed at all levels of the organization. Without this advocacy, your internal program will not yield the results your organization seeks.

- You will need to recognize that being the internal coach/advocate has both advantages and disadvantages. As long as you understand these, and prepare for them in advance, you will maintain the right environment for such an initiative.

- You can more easily establish and maintain clear boundaries while going with the organizational flow to maximize possibilities.

- You can watch the progress of your leadership initiative day-to-day. You can constantly "carry the banner" (BE the Holder) for the outcomes and keep the commitments visible all the time.

- You will also BE the Calibrator. You must have clear, specific intended results that are measurable, and the commitment to follow through on calibration.

Pre-Conditions Necessary for Internal Marketing

Before attempting to "sell" your organization on any leadership development initiative, it is imperative to be sure the following conditions are in place.

- **There must be a need.** For example, the organization's current leadership structure indicates that leaders come from all different perspectives and knowledge of what leaders do/are (BE), but there is no common language or understanding. This is a primary example of a NEED for Legacy Leadership®. Another example of a clear need is the fact that an organization's bench strength for leadership succession is not good, and the organization has a poor track record in this area. There are many such indicators that can reveal a need for Legacy Leadership.

- **There must be a desire** for visionary, inspirational leadership like Legacy Leadership. We can argue that there is ALWAYS a NEED for Legacy Leadership®—in any organization. However, without the compelling desire for this kind of leadership, chances are the initiative will never get off the ground.

- **There must be a CEO, or high level business unit leader** who recognizes the need and desires to sponsor such an initiative, and is able to support and commit to this project.

- **There must be a clear statement of organizational requirements**, including vision. If this is not in place, it can be developed with some assistance, or even internally, prior to beginning a leadership development program, or even marketing internally for one. If clear organizational statements are not in place, it is likely that when these are developed, they will reveal a natural need for leadership development (in order to realize the vision and organizational requirements).

A Cautionary Note About ROI (Return on Investment)

It should be noted that ROI is not a particularly good positioning tool because coaching and the bottom line results of any coaching and leadership development initiative are not yet able to be measured in dollars and cents without very extensive research and access to such things as internal salary figures, hiring and training costs, long term retention records, sales figures and other such indicators. While translating the results of a coaching or leadership development initiative into standard measurable dollar amounts is not impossible, it does require knowledge in this area (best left to those who do this professionally!) access to most likely secure internal records—and time. ROI in these kinds of programs can be elusive, especially immediately following such an initiative. Quite often the results will be seen in more "soft" terms such as more productive and collaborative meetings, a better employee environment, better retention numbers, improved communication and a strong line-up of future leaders within all levels of the organization. The results of such programs are usually realized "down the road" some. For these reasons, we recommend NOT using ROI, initially, (especially as it relates to higher profits) as a marketing or selling positioning tool.

How to Begin Your Internal Marketing Efforts

There are some basic steps that will be extremely helpful (perhaps critical) as you prepare to market Legacy Leadership® within your organization. Take the time required to complete these steps BEFORE your marketing of any internal leadership development initiative.

- Identify and "get to" the influencers within your organization and describe the value of what you are proposing. These people, if properly prepared, will be key to your marketing efforts as they influence others to buy into the program. Don't be the Lone Ranger waving your banner solo throughout the halls of your company. You will need these influencers to support your efforts.

Organizational Vision/Value	Legacy Leadership® Best Practice (and Critical Success Skills) Associated
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2	
3	
4	
5	

- Align your organization's needs/values with the values and benefits of your proposition.

- Align the features and benefits of your proposition with the organization's vision and values. Take the time to lay out a point-by-point listing of the company's vision and values compared to individual Best Practices and Critical Success Skills for each point.

- Align with your internal sponsor(s), present your program proposition and achieve their buy-in.

- Distinguish between current conditions and what the company stands for, and show how Legacy Leadership® can provide (or strengthen) a leadership foundation. Be able to show how Legacy Leadership can provide an ongoing multi-generational leadership thumbprint by developing and growing tomorrow's leaders today.

- Think through potential obstacles, resistance and challenges to a successful integration plan for Legacy Leadership® within your organization and work to eliminate them.

- Develop a set of expected outcomes that are customized and targeted to specific needs within the organization. Resist the temptation to merely state these in generalized language such as "improved communication." Word your outcomes so that they are specific, such as "more efficient meetings requiring less time with more outcome," or "greater customer service results," "higher employee retention resulting in lower training costs," etc. Also determine how these can be measured and deliberately planned for during the course of the coaching and leadership development initiative. For example, if coaching is part of your program, be sure that all coaches (both internal and external) are aware of your specific expected outcomes so that individual development plans can be drafted to target these outcomes.

Putting It All Together

The following are suggestions for preparation in both your internal marketing and actual program term which will vastly improve the odds of first achieving your marketing goal, and then achieving your targeted results.

Sponsor Talk

You will want to discuss your proposition at various points along your timeline toward your leadership initiative with those sponsors you have identified who can become your support group and influencers within the organization. In your discussions, you should consider asking the following questions:

- What is working in your organization? (This is a form of what is sometimes called "Appreciative Inquiry" - questions designed to first identify the positives within an organization—which will ultimately lead you to the next questions: those that target what could be working better.

- Are you getting the results you need? Be prepared early to state how Legacy Leadership® (and coaching, if desired) can impact needed results.

- How are you currently investing in people? How is it paying off? What are the measurable results?

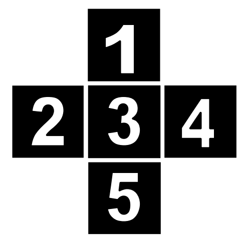
- Do you have excellent "bench strength" in leadership, in leadership succession, and leadership teams? Do you have a basic profile for hiring other leaders, and for developing leaders from within?

- Do your leaders have a common language, common processes, and common expectations?

- Do you have a strong common vision, mission, value system (guiding principles), with strategy and outcomes?

The answers you get from these questions will provide a wealth of information that can be aligned with the expected outcomes of a Legacy Leadership® development program. Be sure you can defend such a program in this way. Spend the time necessary to address each answer you receive to the above questions by linking what is needed to what Legacy Leadership® has to offer.

The Program



Exactly what should your leadership development program include? That will vary by organizational needs. We recommend a complete program to yield the best results and outcomes and longest lasting, sustainable success. The components of such a program would include:

1 **Benchmark Assessments for all participants.** These include, but may not be limited to, the Legacy Leadership 360 Feedback (an online system), leader personality profiles, and any other assessment tools you believe would be helpful to adequately assess your program's participants. These are normally conducted prior to the official start of the program (Pre-assessments) and shortly after the program's conclusion (Post-assessments). The pre-assessments are used to determine an individual's development plan. The feedback establishes a baseline for measurement of leadership competencies. The post-assessments are used to determine success of the program, and the individual's growth, as well as assist in any ROI data gathering you may wish to do.

2 **Legacy Leadership® learning sessions.** These can take any number of shapes, from full 3-day Institutes, to one– or two-day sessions, to even modular sessions scattered through the year or term of the program. These should be highly customized to the organization's needs. It is very strongly recommended that these learning opportunities be team oriented, and directed to existing teams within the organization for the best application of learning and lasting results.

3 **Coaching.** Participants should be coached through this leadership development initiative, using the results of benchmark assessments and established expected outcomes to create workable development plans for each individual participant. Development plans must be tied to real-time business application in order for commitment for coaching to remain high. A regular coaching schedule should be followed, with participants committed to being available and present for coaching. It is also very wise to be sure all participants have an understanding of

what coaching is, what it is expected to do, and what is expected of the participants BEFORE going into such a program. Coaching may be done completely internally, or a combination of internal and external coaches can be used. Legacy Leadership® is the leadership model around which the coaching is performed. Leadership coaching serves as a catalyst for action and change, fosters avenues for reaching new levels of performance, and holds people accountable for accomplishing their commitments. The coaching is regular (about 2 hours per month after initial launch, either in person or by phone) and consistent (constantly coaching against the leadership model and the organizational goals). A Leadership Development Plan is written, coached against, and goals reached with input, approval and coaching of the participant's boss.

4 **Associated Action Learning Projects.** Learning can rapidly vanish if there is no immediate application for practice toward mastery. Action Learning Projects (ALP's) are practice laboratories where the learning occurring in individual coaching and team learning sessions is practiced and mastered. The selected project topic of an ALP is designed specifically for organizational needs. The selection is determined by the team itself, or a sponsoring executive. The project is usually focused on a large overriding strategic issue faced by the executive team, but not being addressed elsewhere. Participants of the Legacy Leadership® Development Program participate equally, practicing the leadership practices and competencies, processes and skills they are learning elsewhere. ALP meetings are facilitated by the leader coach or an internal member of the team.

5 **Calibration benchmarking for progress and viability.** The program will need to be tracked and calibrated periodically. A process for this should be established and the measurable milestones specified. Who will do this? How will you calibrate? This is a critical part of the program.

These are basic components of a comprehensive leadership development program. This 5-point program aligns with the Legacy Leadership® model and the 5 Best Practices:

1: ***Benchmark Assessments***—It begins with a vision for the program, strategy, and knowing where you are starting from. Expectations are set, measurable milestones are known, the starting point is determined.
(Best Practice 1, Holder of Vision and Values™)

2: ***Learning Sessions***—This is the place for creating collaborative environments where new learning happens, and innovation in application takes hold. Teams are introduced to the foundational concepts of Legacy Leadership®.
(Best Practice 2, Creator of Collaboration and Innovation™)

3: ***Coaching***—This is the heart of change. This is where you will be influencing leadership and inspiration to reach previously unreachable goals on an individual basis, and for the organization as a whole.
(Best Practice 3, Influencer of Inspiration and Leadership™)

4: ***Action Learning Projects***—These customized projects join the Legacy Leadership® learning and the individual leader growth for a "rubber hits the road" application within the organization. Differences in individuals, departments and goals are championed and the organization as a whole is advocated. ***(Best Practice 4, Advocator of Differences and Community™)***

5: ***Calibration***—This benchmarking process is vital for success, as measurable milestones are tracked, and corrections and calibrations in responsibilities and accountabilities are a regular part of the program's course and term. ***(Best Practice 5, Calibrator of Responsibility and Accountability™)***

The components of any program may be customized and tailored for individual organizations. The program may also include more components, such as specialized training in other areas like strategic planning. These specialized sessions, however, should also be linked to the Legacy Leadership® model. Great leadership is essential for EVERY activity. Legacy Leadership® should be the culture and foundation upon which everything else is built.

The Players

When putting an internal leadership development program together you will want to determine who the people are who will be delivering this program. You may be the internal marketing person and driving force within the organization for this program, but will YOU be the one doing the work? Who will coach? Who will deliver the training sessions? Who will do the assessments? This is where you need to consider the question of INTERNAL or EXTERNAL personnel. In our experience, the best answer to this question is a COMBINATION of both internal and external coaches and trainers. There are many advantages to this joint program; here's just a few:

- You are partners from start to finish (a team approach!).
- You can draw on more varied experience and expertise and have the ability to debrief with different perspectives.
- You can have a critical objective view with external coaches and trainers.
- The roll-out of such a program is vastly easier.
- The entire project becomes a collaborative program, with more easily measured and calibrated tracking.

So, who are your players? If you are teaming up with external professionals to assist you in conducting your internal initiative, be sure to give some consideration to the contracting process, including expectations of all parties, costs, time allotment for contract negotiations, etc.

The Proposal

Successful internal marketing of any leadership development program will rest upon a strong proposal which has been prepared only after considerable research and thoughtful consideration of the unique requirements within your organization. Your proposal can be built only after undertaking the previously mentioned steps. The proposal should be in writing, and constructed, then presented, with the following steps:

- Prepare an internal business case. Your preliminary interviews and conversations with the “influencers” and top leadership will provide validity for your case.

- Include the Legacy Leadership® model card and a basic overview of Legacy Leadership® in order to achieve buy-in for this leadership model. Include any relevant research results and defense of the Legacy Leadership® model in comparison to other models you have investigated. Explain Legacy Leadership® as a comprehensive foundational and highly flexible (adaptable) leadership model, building on what is already working well in your organization.

- Be sure to include the features and benefits of Legacy Leadership® that apply to your organization, and carefully match the company’s needs (and desires!) with those benefits.

- Include details of the proposed program, including definitions of the program components (coaching, leadership development training, etc.), who will be conducting the program, organizational structure of the program, and all other relevant information.

- Talk about expected outcomes as a result of conducting the Legacy Leadership® development program. Show how those outcomes are specific to your organization’s vision, values, and observable goals. How will this proposed development program provide an organizational culture shift in leadership?

- If possible, get the buy-in of the CFO or other resource allocation authority.

- Be prepared to discuss your research regarding how such an initiative is working in other groups or companies.

- Give thought to the realities of realizing these outcomes in terms of time and the continuing need for daily operations. (How will everyday business impact achieving the goals of this project? How will you work around certain commitments and time sensitive business requirements in order to successfully gain full participation in this program?)

- Lay out the expenses involved, timing, and individuals recommended (if this is appropriate for you, the internal marketer) to participate.

- Describe the levels of commitment necessary for a successful program—from the top leadership through all levels of participation. What exactly do they need to do? When? What is required of them? What will be your method to insure this commitment?

It is important to have a written proposal including information about the items listed above. However, much of your presentation and defense of your proposal may come in a live and personal conversation. Be sure you have all the facts straight, that you have done all the research you need to do, and you have plenty of information (anecdotal and other) as backup when you actually present this proposal. Be prepared to answer questions about any part of your proposal, AND to sufficiently dispel scepticism and hesitancy. Are YOU sold on this program? If so, be able to sell others as well. If you are NOT completely sold, it's time to rethink this process! Your role in this program will require large doses of faith, commitment and persistence. If you don't have that now, this may not be the time for such a development program.

Final Thoughts

When an organization undertakes a Legacy Leadership development program, they will be gaining a thoughtful approach to leadership, foundational to the organization, and a complete and comprehensive development program—not just a "drive by" touch-and-go token training. Legacy Leadership is completely flexible and highly adaptable and provides an organization with a common language that may not exist prior to this program. It is a way to develop leaders that has real-time (immediate) business application. (It is a "just in time" system rather than "just in case.")

Your business case, and all your internal marketing, needs to include the clear proposition of these values. However, you should also be fully aware of what this leadership development program is NOT. **It is NOT easy. It is NOT quick**. The average time frame for lasting change is a minimum of one year, and longer for any real depth of understanding within the organization. Be ready to exercise those "virtues" mentioned above: unflagging faith, consistent commitment and tenacious persistence. ***Are you, and your organization, ready for this?***

A reminder... **BP2**

A CREATOR
Causes something to "come into being" often through original or inventive means.

COLLABORATION
Is the process of working together to achieve common goals instead of personal agenda.

—The Legacy Leadership® Field Guide

Marketing Notes

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