



By David Zahn

*Last month, David wrote about how Clow Zahn Associates officially launched and sold its first few projects. Now, after the euphoria of starting their own firm has begun to wane, it's time for David and Jeff to get down to doing business day-in, day-out. Here's how they sorted out their roles to sustain a thriving practice.*

2000

September 5

*With the official close* of the summer and the excited chatter of our kids about back-to-school specials (and an end for me having to make creative excuses for not appearing in a bathing suit), Jeff and I are eager to ensure that our first couple of months were only the beginning of an uphill trend of success.

The bills are coming in on a regular basis now—office rent and supplies, professional services, credit cards, and so forth. In rough terms, Jeff is the recognized sales or outside guy; I am the operations or inside guy. Therefore, I keep the checkbook and ensure that cash flow and deposits and all matters financial are watched carefully. I also maintain our inventory of supplies (binders, tabs, printer toner, and so on) at an appropriate volume, and Jeff focuses on pursuing opportunities to get in front of clients. With frequent discussions between us and being vigilant not to let bills pile up or let decisions be made unilaterally, we fall into the rhythm of our respective jobs. We both contribute across all functions, but, generally speaking, I take care of operations and Jeff takes care of sales.

September 13

*Jeff's wife calls* while we're out of town on a client assignment to let Jeff know that his teenaged son, Chase, has been sent home from his job with extreme pain in his chest and difficulty breathing. Had there not been an airplane available to take Jeff home, I'm reasonably certain he would have run across two time zones and arrived at the same time as the plane. I complete the session with the client (who is very understanding and offers to leave at once), but my thoughts are with Jeff and his son.

Later in my hotel room, I reach Jeff and get more details. Chase experienced a collapsed lung (the fact that he's 6'3" and rail-thin turns out to be a contributing factor) and will need surgery if it doesn't heal on its own. My thoughts are for his speedy recovery. (Jeff and I had co-coached Chase in Little League, and Chase's fastball once broke the ring finger on my left hand. Since then, I've felt linked to Chase, due to my forever-crooked finger.)

September 21

*Chase is going to need surgery.* Jeff is distracted, but he still tries to fulfill the requirements of the burgeoning firm, as well as schedule doctor appointments and x-rays and call insurance companies. I try to ramp up my own contributions in the selling effort, spending a few hours each day on it to give Jeff some extra time.

September 29

*Jeff and I leave the hospital* after visiting Chase post-surgery to meet with a client who has a fairly simple need. On the way, Jeff and I discuss our approach. He feels ready to address this issue (and also seeks a break from seeing his son in pain), and we agree that we can't make it appear that the solution the client wants is all too easy to see. We decide to spend a good part of the meeting having the client play back to us what the need is, what has been tried before, why that has or hasn't worked, and what would constitute a good outcome this time.

We're escorted into the meeting room, and Jeff turns on the sales magic he's noted for. I have more of a meat-and-potatoes consultant style. I prefer the logical approaches, penetrating questions, clever insights, creativity, and being factual in my recommendations. Fortunately, in this instance, Jeff kicks off the meeting and engages the client in banter and discussion and very slowly leads the client to our agreed-upon recommendation. When Jeff starts to run out of steam or questions or (just needs a break), he turns to me (trying to hide that I'm bristling at the slow pace) and asks me to expound on the benefits of one approach over another. I go in to a trained seal act to flex my instructional design muscles,

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orchestrated by Jeff to allow him to regroup and think of the next series of questions for the client. At the conclusion of the full-day meeting, the client has become a believer and I have assimilated another lesson into my arsenal: A client has to be ready to buy before you can sell him or her. Jeff recognized that this client needed to go slowly and have his hand held throughout the process.

Jeff returns to the hospital, and I go in search of why our accounts receivable sum is growing (good thing). Is it because clients aren't paying us in a timely fashion (bad thing)? And where's the shipment of binders I ordered? How come the copying of our next training manual isn't done? Did the bank post our last deposit? Where's the fax I was expecting telling me how to get to Monday's meeting? What surprises do email and voicemail have for me?

### The client insists we raise our fee... I think, "Who are we to argue with a client?"

October 2

*The directions never come* from the client, but I vaguely recall where the meeting is, and I get some directions off the Internet. Jeff and I head out at 6 a.m. for the 9 a.m. meeting about 120 miles away. It's too early to call the client to confirm directions, but we at least know in what general direction to head. Jeff fills me in on "our patient," who's still in pain and has become somewhat surly.

I mentally go through the call we're about to make as Jeff is talking. I want this business badly and don't want to make a misstep. In my head, I review the presentation I've brought with me and double- and triple-check that I have all of the supporting materials I need. In our customary fashion, Jeff will do the talking, as will I, but I also bring along a supplement of binders, reports, and examples of previous work—just in case!

We find the client site without too much trouble, and we're asked to sit in the lobby to wait. I pick up the client's annual report and thumb through it, looking to see whether there are pictures of the person we're going to meet, but don't find any. The client arrives but rather than take us into his office, he asks if we can go for a bite to eat. He has brought another employee with him, so we split up. I go with the client in the car Jeff and I drove, and Jeff goes with the other employee. (We needed two cars because the client and the other employee had to be in different places immediately after the meeting.)

In the ride to the restaurant (Is 10 a.m. a breakfast or lunch meeting?), the client tells me he's a former salesperson and is impressed by my background in instructional design. He says that he's tired of being "sold to" and has radar for sales

spiel. He all but tells me outright that the reason he wants to work with us is so that he is *not* sold to about the benefits and virtues of this and that. He wants to deal with someone who is into training for the love of training. When I say that I'm writing a series of articles as an example of my love for training, he seems to be ready to sign on the dotted line right then and there. Now, if only Jeff will catch on to this and adapt, we'll be home free. Except that there's no time to talk to Jeff alone before we walk into the restaurant. Hold your breath, this might get interesting.

We order our food. I want to compromise between breakfast and lunch and get a burger on a bagel, but I settle for a Caesar salad. The conversation is light and engaging, and the client seems at ease with us. A few times, Jeff tries to steer the conversation towards a close, but it's not oppressive and no one takes offense. Then, the client surprises us by saying that he's willing to talk about fees and when can we begin. He also asks if it's alright if he pays us up front so he can spend his year 2000 budget and then pay us the rest in 2001. We were prepared to bill it completely in 2001; now he's offering us money in this year for the privilege of being his selected vendor. Jeff and I race to say, "Of course!"

The client tries to get us to commit to a specific fee for the project. As he awaits our answer, Jeff looks across the table at me to see whether I'm going to jump in before he does and I tap Jeff under the table with my foot, hoping he'll figure out his left knee is the 10 column and his right knee is the 1 column. So, three left-knee taps and five right-knee taps and Jeff thinks there's a small furry creature under the table. Fortunately, we're on the same wavelength because just as the last tap falls, Jeff says that "\$35K would be our fee for the project as it's currently scoped."

The client insists we raise our fee because he wants to bill his divisions and wants them to perceive there's higher value on a per-class basis. I think, "Who are we to argue with a client?"

October 10

*After hounding a potential client* for a meeting and even joining a share group the client belongs to, Jeff and I are finally getting to meet with two people: the client contact I'd been pursuing and that person's boss. But when we're ushered into the conference room for the meeting, three people are waiting for us. Jeff introduces himself and shakes the hand of the third person, who returns a less-than-enthusiastic handshake.

Not to be deterred, Jeff asks what he does for the firm, trying to engage him and find some common ground. The man shrugs, and says, "I'm not sure why I'm here. I was told to show up, so here I am. I guess I manage the sales-support function, but I'm not sure what that has to do with this meeting." Warning lights go off in our heads. Is he here to knock down our ideas? Does he have an ax to grind with the other people in the meeting? What is his unofficial role in this meeting, or his hidden or personal agenda?

I kick off the meeting and, in short order, Jeff and I are playing off of each other well. The client contact's boss then stops

the meeting to ask Jeff which division of Procter & Gamble he came from. Jeff is mildly startled, because he hadn't mentioned that he'd spent 13 years there. The boss says that Jeff's style is classic P&G and that it's clear he had P&G training. The meeting then turns into a "do you know?" discussion. When we finally get back to business, the boss had already decided to move ahead on the project (pending budgets for the new year), Clow Zahn Associates is the preferred vendor—based on the mix of Jeff's sales background and my training experience. As for the third person who was in the meeting who had no idea why, I think he might still be sitting there.

October 12

*Jeff's son is home* and recovering. Jeff enlists me to motivate Chase to look into colleges and early admission. So, I "happen" to come over for a completely different reason and "happen" to ask Chase what he wants in a college (size, closeness to a city, and so forth), and then I punch the criteria into a Web site that spits out schools. After a while, Chase begins to take interest and narrows his choices to five. My job is done, so I leave. I have bills to pay, accounts receivable to track, accountants to ask questions of, clients to return phone calls to, and, if

I'm lucky, I can get home in time to have dinner with my boys.

Starting my car for the ride home, I reflect on the past month and am amused at how much of this business requires one to be a chameleon at times. You have to read client situations and needs (spoken and unspoken) and adapt. Whoever said that a leopard couldn't change his spots wasn't familiar with the breed known as Consultant. As I steer my car onto the highway, I fiddle with the radio and find a country station playing Tanya Tucker's, "Sparrows in a Hurricane." I roll up the windows so nobody hears my off-key warbling:

*Like two sparrows in a hurricane, trying to find their way,  
with a head full of dreams and faith that will move anything.  
They've heard it's all uphill, but all they know is how they feel.  
The world says they'll never make it...love says they will.*

Postscript: Chase is fully recovered and has been accepted to the University of Oklahoma (Jeff's alma mater) on academic scholarships.

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*To contact David for further information about his evolution or to share your thoughts with him, call 203.221.2789 or email davidzahn@clowzahn.com.*