Cheat sheet
Promoting & selling your services

So, you're about to start your career as an MBTI® practitioner? Congratulations!

It's exciting, but it can be a bit daunting too. How do you position yourself, build credibility and provide the right information to potential clients?

Here are some tips to get you started and, we hope, make your journey a little bit smoother.

1. Decide the services you'll offer
2. Identify your audience
3. Build your profile
4. Prepare to pitch
5. Price your offer
6. Be prepared to walk away
7. Follow best practice – write a proposal, make a contract

Decide the services you'll offer

Think about what you want to do and can do. For example:

- Facilitation
- 121 or group coaching
- Group and individual feedback
- Virtual delivery

Decide what you can and will do, and include the list in your promotional spaces – be clear and confident about your offer.

Remember, virtual/remote teams are increasingly common.

If you can deliver sessions virtually, it could be a great selling point. Virtual/remote delivery reduces the cost for your clients in terms of venue hire and travel costs.

Tip: use your client's technology whenever possible. They know how it works and will have the resources to support it if anything goes wrong.

Identify your audience

Who will you work with? Corporate clients, individuals, teams?

When you know your target audience, you can deliver consistent, focused messaging and appeal to their needs.

Some businesses are too small to hire practitioners – but they can still benefit from MBTI services, and you can benefit from their custom. Consider whether you want to offer **pro bono services** to such clients. This can often make great business sense because:

- You get a varied client base
- These clients might be willing to work with you to create case studies that help you promote your services
- It helps to raise MBTI awareness and create MBTI advocates

Build your profile

Many potential clients like being able to research online so think about these points when building an online presence:

- Your website doesn't need to be complex, but it must clearly define who you are and what you offer.
- A professional web presence often includes a LinkedIn profile. Be sure to include a professional photo on both your website and LinkedIn profile so that potential clients can begin to establish a connection with you.
- Consider your **social media strategy**. You can build trust with your target audience by following, sharing and contributing to social media posts, blogs and tweets. Join relevant LinkedIn groups, including ours!
- To help you explain your services, why not embed **this MBTI explainer video** on your website?

Prepare to pitch

While an online presence is important, you will also meet potential clients in person.

Write yourself an 'elevator pitch' so you can explain quickly and clearly what you do and how you can help people. Print business cards so potential clients can contact you and find you online

Pitch tips:

- Consider key points that will spark interest in your offering
- Make sure your pitch sounds natural in conversation
- Keep it to no more than 30 seconds in length
- Consider ending your pitch with an open question
- Practise your pitch so you're always ready!

Price your offer

Think about the time it will take you to design or prepare for a session, as well as the time that you will spend with your client. Your time is valuable, and you have invested in the skills to certify you to deliver the work. Don't sell yourself short.

Pricing tip: if a client challenges you on your quoted price, do you need to consider alternatives?

For example, you could:

- Adapt your proposed solution to save costs and reduce the price
- Consider offering a discount for something in return, such as a case study

Be prepared to walk away

Can you win this work, or are you wasting your time? When bidding for work, think about these points – and be honest with yourself:

- Do you have access to decision makers?
- Are you in a competitive situation?
- Are there warning signs that this is a 'box ticking' exercise?
- Does the client have budget?

You can also consider:

- Have you worked with clients in a relevant industry?
- Can you get references or referrals from clients in that industry?
- Do related industries have similar issues to those you have addressed for key clients?

Follow best practice – write a proposal, make a contract

To show you understand your client's needs, outline a potential solution up front.

Write a proposal. A basic format can include:

- 'What I heard' – demonstrate you have listened and understood the needs of your client.
  Top tip: include indicators of what they define as 'success'
- 'Solution to address your needs' – give an overview of the solution. At this stage it's fine to include various options for your client to think about
- 'Pricing' – outline the costs of each option including design, delivery and any materials
- 'Next steps' – share key milestones for the work. Make it clear how the client can progress
- 'Why work with me' – share an overview of your business including testimonials from other clients

The contract is your chance to confirm exactly what you are delivering, by when and for what fee.

Basic terms of engagement can include:

- Summary of work to be delivered
- Location – where the work will take place. It's a good idea to be clear on this as a change in location could impact your travel time and costs
- Key dates – when the terms of engagement need to be signed and when the solution will be delivered are two examples. **Top tip:** why not write a 'responsibilities' section making it clear who needs to do what and by when? This helps your client understand their role in making the work happen
- Fees – don't forget to advise whether you will charge for business expenses. Clients may appreciate an estimate of what these costs may be
- Cancellation/postponement – don't forget to include your terms of business. Think about when you are likely to have committed time or costs and build this into your cancellation policy

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