

Bizymom's Guide To



Starting Your Own
Welcoming
and Referral Service
By Joan Curtis

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Thanks for your purchase of *Bizymom's Guide to Starting Your Own Welcoming and Referral Service*



Here at bizymoms.com we always want to give you more for your buck. So for each one of you that have gone out of your way to better yourself and your family, by buying this publication, we have a special gift for you.

For the next few months we will be offering a special chat on the topic of this ebook. The author, Joan Curtis, will be answering your questions – live! For a schedule of when this chat will be available visit: <http://www.bizymoms.com/echat42/public/>

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Forward by Liz Folger, Founder of Bizymom.com

I was so excited when Joan e-mailed me about becoming a host for Bizymoms.com. Her topic of expertise was something we really needed on the site. I was receiving so many e-mails from moms who wanted to start their own welcoming service. Unfortunately, there wasn't any clear direction out there on how to start this type of business. I knew Joan would be welcomed here with open arms.

When our first ebooks started to go up on the site, Joan e-mailed me with much excitement about writing her own ebook. Her dedication and care to giving you the information you need to start your own successful welcoming service is evident in this ebook, in Joan's chats and on the Bizy Moms message boards.

Let me be the first to congratulate you on your road to success!

*To Your Destiny!
- Liz Folger*



A Word from Joan Curtis

Hello everyone! Welcome to my first e-book, *The Bizymom's Guide to Starting Your Own Welcoming and Referral Service*. I am so excited to share this information through Bizymoms.com. It has been a wonderful experience being the CEO of my own business! Many people have said to me, "I wish I would have thought of that!" You don't have to think of it! Now you can just do it! If you are someone who spends money in your community, and knows the best places to go for the best deals in town, you already do this by referring business to those establishments. Why not get paid for it!

In this book you will get the basic "How To" information that will help you begin a very exciting advertising business. You can use this same concept for many other types of service. Begin with newcomers and move on to new mom packets, new bride packets, and much, much more.

In the beginning...

I had just given birth to our son on July 23rd, 1999, and he was only a week old. I was lying down with my son on our bed when my husband came to me with the idea for a newcomer greeting service. I laughed at him. I have a daughter who was 20 months old at the time and was still feeling the "glory" of childbirth and now, "He wants me to start a business? He has got to be kidding!" But then I was up at 4 a.m. with my little man and started to think ... I really could do this! I don't have a degree in marketing, but I am a mom and I know what I like to buy for my family and what types of services I use. I am always telling people about the great deals I find around town. Why not share with new people the information they will have to find out over time all at once in a gift bag! Then I got really excited! I have a background in printing and I have a few graphic programs that I am really good at creating cards on. So I began my research...

Now....

I have about 20 clients who pay me to deliver their information to newcomers. I have helped women all over the country to find their niche with newcomers and I am a regular chat host on Bizymoms.com. It is so exciting to me that you are reading my words right now... just another great opportunity that has been afforded me through my Welcome Service. I work when I want to and how much I want to. My husband works part time for me delivering the gift bags. I am able to do more for my family and with my family. I have made so many new friends. I am a Christian and have been able to minister and encourage other business owners. When you work for yourself it is nice to meet people who know where you are coming from. I really enjoy the people part of what I do. I am not saying this is not hard work, but it does eventually take care of itself. As with any

business, if you put your mind to it and perseverer, you can do it! The income potential is open to where you want it to be.

Anyone can do this business. I think every person can do it in their own style and make it work for the style of their community. I live in a town of 72,000 people. You may only have 10,000 or 1,000,000,000. You need to create your own niche with the newcomer. I have written this book as a guideline for you to use. I want you to succeed. Congratulations on your new business venture!

ENJOY ! Remember... You work for yourself now!



CHAPTER 1

WHAT IS A WELCOME AND REFERRAL SERVICE?

Let's begin with a basic understanding of what we do with our welcoming service. Every month we deliver sponsored advertisements to newcomers, first-time home buyers, and some cross-town moves. We deliver in the summer an average of 225 gift bags and in the winter months an average of 180 newcomers. We have all types of services, entertainment and restaurants that provide gift certificates and information about the community. We also provide a gift of a full-color fold out map of our city that helps the newcomer locate the sponsors. We do our deliveries from the beginning of the third week of the month until the end of the month. We offer a 30-day call back to encourage the newcomer to solicit the sponsors. We encourage the sponsor to also call the newcomer to do follow-up and sales calls to create business for themselves. What makes us different from other services is that we are a personal delivery service that goes to the doorstep of the homeowner. We do a follow-up with the resident that is non-invasive. We do not offer demographics because of the sensitivity to the privacy of the new residents.

A different service that can be offered with newcomers, that is very effective, is in-home visits with the new resident. We do not offer this, however, some services do. This is very effective in getting the information into the hands of the newcomer. You can really get a feel for what the needs of this family are by sitting down and letting the newcomer know that the certificates are offers that are exclusive to them, because they are new to the area. This program is designed to allow the newcomer to get to know the area and what types of programs and services are there for them to use.

I really love my job! As I am writing this book, I just received a call from a business owner who was new to the area and received our gift bag. He wanted more information about getting involved with our program! YEAH! It can't get easier than that!



CHAPTER 2

WHERE DO I BEGIN?

Research and development

When beginning any business it is always a good idea to begin with research. With newcomers, it is especially important. You need to find out where your list of names is to be created from; do a cost comparison between other forms of advertising; and also if there is any other type of service like yours already being offered. The only way to offer good service is to know where service is needed. Find out as much as you can about advertising in your area.

I began researching by checking to see if there were any other types of greeting services in my area. Guess what ... there was! Do not be discouraged and quit here, I didn't. I called my competitor and found out what they offered and designed my business to be different and yes BETTER! I also did some asking around if anyone had ever received the "other" companies information. I did find someone who had and I then was able to see what they offered and knew that shortly I would be their competition and they would no longer be mine! Some of you may be familiar with a national company that may sell in your area, call them and find out what type of service they offer, how much they offer it for, and how quickly they get the information to the newcomer. You can always find a way to improve the services offered, even if it is only through a less expensive rate! I could offer a mailer, but I chose not to because it would cost so much more to maintain with postage and I would have to charge for printing. I will talk more about this in later chapters of this book.

While doing your research, create a cost comparison analysis. I would suggest you call any and all other forms of advertising and ask them to send you information about their business and a rate sheet. Let them know that you're finding out what advertising in your area costs and nothing more. They may want to know the name of your company. Tell them you are in the process of starting a new business and you are not ready to share that information, but would possibly be interested in advertising with them in the future as you are creating a marketing plan for your new business. They should be more than happy to send you the information. I would create a file on each of your contacts and try to call once a year to see what the rate changes are. This would be good way to make sure you stay competitive in price.

You will need to decide the presentation in which you would like to deliver the sponsor's information. I use a brown bag that is a craft sack with paper twist tie handles. In my research I found newcomer services that used anything from

baskets to envelopes. My goal was to give the newcomer a bag that they can use again. I ordered my bags from **Neil Trowbridge of BNB Systems** in Tulsa, Oklahoma. My cost per bag with hot stamping is 0.51 per bag for 1000 units. I believe the start-up cost was around 100.00. Call Neil and he will give you a current price. I have always received excellent service from Neil and he is just a great guy!

Call him and give him a try. **BNB SYSTEMS INC. (1.918.664.4345)**

FINDING YOUR NAMES

Another very important thing to research is where to get your names to create your list of newcomers. There are several sources to do this, but your area may not provide all of these sources. Whether you are in a small rural area or a big city, you can get information from the County Clerks' office about new deeds. Some counties might house this information in other county offices. The County Clerks office is a great place to start. This is the most common way to get addresses for newcomers. When someone buys a house you can get the information from the new deeds for the address and when you do the delivery, interview the newcomer for their name and phone number. For example, you can say to them, "Hello, I have a gift bag for you to welcome you to the area, but I will need you to sign your name and give your phone number to verify that you have received your gift bag to my employer." This way you save money on getting the phone numbers and you can call information for the ones who do not want to give their phone numbers out.

Another option you may want to research is through the city utilities, the electric company, or water department. There is usually a charge for this service. For example, the town I am in has this service through the electric company and they charge \$2.00 a day. The average cost is according to how many days there are in the month that the office is open. It costs me approximately \$40.00 a month for a list from the electric company. I then take this list and compile it with the list from the new deeds to verify that they are new to the area and that they have moved into their new home. If you are concerned that your list is filled with people who may not be new to town, you may want to cross check the name and address with the local telephone directory to verify that the resident is indeed new to the area. This is a great selling point also. You can earmark newcomers and include this information on your final list that is sold to the sponsor.

TIP: If you have been unsuccessful in finding the names, don't give up, you can call the local Association of Realtors. Your company can become a member and have access to the software that Realtors use to find listings for potential homeowners or customers. It is a great way to find out when homes sell. You can also offer your service to realtors themselves and get the information about the newcomer from the realtor.

Finding out as much as you can about your community is of great benefit to you. The best way to recommend goods and services is to know what types of goods and services are offered in your area. Become familiar with non-profit groups as well. They do advertise, but perhaps do not have the budget to pay full price. I have done a lot of trade out for advertising with non-profit groups, which have helped me get the name of my company out as a charitable company. This shows that I am a good company that cares about the community that I work in and support. I feel a good reputation is as important as a good name. What better way to have a good reputation then to support groups that help others? If you associate with winners, you are a winner. You can encourage newcomers to volunteer their time in the community and get plugged in without having to over commit their time! I really love the response I get from the non-profit groups who get quality volunteers.



CHAPTER 3

DO I REGISTER MY NAME? And other biz registration questions.

In this chapter I hope to give some practical advice on saving money during the start-up phase of your business. It would be so easy to believe the idea that “I NEED THIS THING TO SUCCEED.” I fell into this myself. I bought a \$80.00 brief case to complete some idea of success that I had in my head and it collected dust in my office for a year before I sold it to a friend for \$30.00. Remember you are in business for yourself. No one else is footing the bill. I hope to help you make wise choices and to avoid high start-up costs.

PLAN YOUR OFFICE

Setting up an office is so fun! You may want to attend the chat the Bizymom chat on organization to help you stay ahead of the game when it comes to getting it together. You will enjoy creating a comfortable workspace for yourself. I love to go into my office and play!

Begin looking in your home for basic office supplies and take an inventory of what you have and compare it to what you think you are going to need. Do you already have a desk that isn't being used for anything except clutter? Maybe you have a couple of extra scissors or staplers. Do you have a file cabinet filled with old papers that can be stored in the attic? By being aware of what is available to you in your everyday life, you can save a lot of money by avoiding a large expense of office set up in your first months of business. Maybe you are a parent; you are very creative when it comes to your kids ... now that creativity can pay off for you! Another good place to find great office supplies is at estate sales or garage sales. Also ask around to your friends and family and see if they have anything they want to get rid of. Maybe they worked at home and do not use everything they have in their office. It can't hurt to ask.

Business supplies are relatively inexpensive, but you can really get carried away in the excitement of being home and feel the NEED to go and SPEND SPEND SPEND! I am not saying that you can't enjoy yourself, just be careful.

TIP: Remember to save your receipts for everything. You can't write it off without your receipt.

DO I REGISTER MY NAME?

YES! YES! YES! AND AGAIN YES! Definitely register your name with the Secretary of State's office. Take some time to choose several names for your business, in case one is already taken. This way you have a few you like and something to choose from. You may be able to get this information online or over the phone. Call your Secretary of State's office to find out what your state requires of new businesses and what the fee is to become registered.

Why do I stress this so much? It is because your name is a vital part of having a successful business. I would even dare to say it is the most vital part of your business. You need to have a name that is easy to remember, easy to recognize, and is also easy to say. I have found that everyone would want to call me Welcome Wagon because of what I do. You need to establish your name as the leader in newcomers. You're more personal, you're better and everyone should compare them to you. You ARE your business, so your name reflects you and how you want your business to be seen in the community. So choose wisely.

Also it is important because if you do not register your name and someone else is using that name, they can come to you and legally demand you to change your name or demand part of your profits.

HOW DO I, AND WHEN DO I BEGIN TO ADVERTISE?

I would look at what your budget says first of all. You may have an amazing network of people to help you get started in your community. I personally choose not to do any advertising other than word of mouth at first. I wanted to wait and give myself a year to see what I could do without that additional cost. I now advertise and the company pays for it. I would suggest you get in touch with your local Chamber of Commerce. The Chamber was the smartest thing I have ever done. You get the opportunity to network with your customer base. The members of the Chamber are people who care about the community that they do business in. That is your target market for sales. They may also offer inexpensive alternatives in advertising. The Chamber has been an important part of my business and I have gotten a lot of referrals from the Chamber.

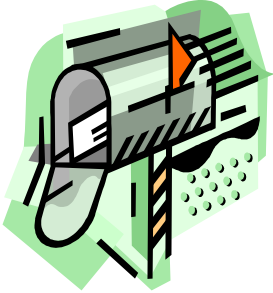
SHOULD I DO MORE THAN ONE AREA?

Something that I have watched happen is someone gets the idea from me to do this biz and then they say "I am going to do these six areas and be rich!" That is great, if they want to do that. However, I would suggest starting small and growing. You may decide after starting your one area that area is all you can handle. It is much easier to grow than to downsize. Take your time in making

your decision. Start in the area you think this idea would be most well received. This will give you some momentum to work from. I personally think that one area is a lot until you have your system together. It can be done. I just want to spend time with my kids and so I choose not to. I think that you might all feel the same way... so start small.

SOME MORE PRACTICAL ADVICE WHEN STARTING YOUR BIZ

Let me encourage you that many people are going to be really excited about what you are going to do. They are also going to ask you to become a member of their club or group. I remember that I received so many invitations to different business groups that I could never have gone to them all. I then decided that the best thing for me and for my business would be to wait to join any groups. The Chamber of Commerce was the only one that I joined right away because they are set up to help me to succeed. After about six months, and only after I had taken some time to find out about each of those groups and what they had to offer, did I decide what groups would be best for me and my company. I wanted to make sure that the time commitment and the financial commitment was one that I could handle, and also that the group I would be joining would be beneficial to my company. Get ready, you are about to become very popular! 😊



CHAPTER 4

HOW DO I WRITE MARKETING MATERIALS TO PRESENT TO POTENTIAL SPONSORS?

Writing an ad for a client and writing one for you is totally different! You'll feel so much a part of your business that you might want to put everything into the written materials that go out in your name. **WRONG!** Do not put every little thing about your business in every piece of written word that you send out. The reason is because you do not want to give all your secrets away, plus you will not have anything to discuss or sell the sponsor when they call. Give them only the basic information and leave them with questions. You want to talk with them and find out what their needs are and tell them how you can benefit them personally. An example of too much information would be:

We create our list of your potential clients from the utilities list that is provided by the electric department on a weekly basis. We do the data entry for you saving you time and money.

vs.

We personally create the list of newcomers by researching the information for you saving you time and money, updating the list weekly!

Keep your wording very simple. You do not want to make the person reading the information feel like they can't reach you. Your customer needs to understand you. Have you ever read a brochure and not understood what the person was selling? I have. Therefore, I suggest creating a brochure that is in a bullet format. A bullet format would consist of basic information and then a series of bullets with highlights.

(YOUR BIZ NAME) is (your town's) finest welcoming and referral service. We dedicate ourselves to personally welcoming each newcomer to their new town with information about not only local businesses, but also non-profit and community services available for all ages.

- ❖ **personally delivered advertisements**
- ❖ **most cost-effective way of advertising available**
- ❖ **local businesses, community information, as well as non-profit information provided**
- ❖ **local map included with each delivery compliments of (YOUR BIZ NAME)**

CALL 405-555-0000 TODAY FOR MORE INFORMATION!

Having a brochure on hand when someone wants more information about your company is great. You can just drop it in the mail and then do a follow-up call to make an appointment. Carry one with you when you are out doing your errands. You need to talk about your business with every business you come in contact with. This will fill up your bag and your pockets much quicker!

I have created a quick glance guideline for you to follow when writing your brochure or flyers for clients.

1: Use short, frequent paragraph breaks.

Try and keep your paragraphs as simple as three sentences.

Your information will be more inviting to read and take less of a commitment from the reader to complete and comprehend the information.

2: Use simple words when possible.

Keep the wording down to earth

Car vs. Vehicle

Building vs. Facility

Housekeeper vs. Environmental Technician

3. Avoid unnecessary words.

A huge mob of people gathered on the grassy knoll of the State Capitol today to protest the petition being brought before the legislature.

vs.

People gathered today at the capitol to protest the petition before the legislature.

4. Avoid redundancy.

❖ Is in need of vs. needs

❖ Two separate occasions vs. twice

❖ General public vs. everyone or public

❖ Previous experience vs. experience

5. Include name of business, address and phone number.

I have to get up on my soapbox now! Something that gets to me is when businesses do not put their company phone number on promotional information. If I have to search for your number, then chances are I am not going to call you. I even place my phone number on the return address on my envelopes. I want to be easy to find and easy to use. For example, if you sent out a sales letter to a potential client, you should have your number in four different places. The first should be your letterhead, the second in the body of your letter, the third is on the business card you send in the letter and the fourth should be on the envelope it is being sent in. You may say isn't that overdoing it a little? Think of the last time you had to look for someone's number and couldn't find it right away. Did you call them? I bet you didn't.

A great alternative to writing a brochure is to write a sales information letter that you can send to people upon talking with them.

Dear Bizymoms.com,

November 15, 200X

Don't wait to build your customer base and increase profits!

Take advantage of personally delivered advertisements in welcome packages to the doorstep of your new customers. This can give you the personalized edge you need over your competitors. Receive the list of newcomers while you are shaking their hand at their front door all for one low price. (YOUR BIZ NAME) would be honored to represent you to newcomers of (YOUR TOWN). We provide short-term contracts and have the most cost-effective program around!

Call Joan Curtis at 405.555.1212 for an appointment. We can bring you a gift bag and talk more about this wonderful opportunity to increase your sales and get the word out about your company!

Sincerely,

Joan Curtis
Director of Marketing

I have found this has been much more effective for my business. Use this letter for yourself. Place your information on it and you will have your first mail out for business leads. Good luck!



CHAPTER 5

HOW DO I DO SALES CALLS? Tips and Suggestions

Welcome to the second most frequently asked question concerning newcomers. (The first being where to get names) If you are saying to yourself, “But I am not a natural born salesman,” it is okay. You need to realize you have a business that is marketable all on its own. Everyone needs advertising, whether it is by word of mouth or by print. You have the advantage of having both to offer them. You are a welcoming and REFERRAL service. You will verbally recommend them customers as well as deliver their information to the doorstep of future customers. I would like to give you a basic list of do’s and don’ts in sales and also a script to use when calling over the phone or in person. You will have a different sales style than me, so I want you to take this and change it to fit you and your company.

PHONE SCRIPT

This script is for cold calling on businesses that have never heard of you.

NB = you

S = Sponsors

NB: Hello, can I speak to the person in charge of your advertising.

You always want to find the person who makes the decisions. Do not go to a sales call without that name. You will be wasting your time. You can explain your business to someone much better than a sales clerk or secretary that had a hard time understanding you in the first place.

S: Well, Miss Soandso is not in right now, can I take a message?

ALWAYS leave a message. You want them to know how many times you call and if you do not leave a message, they will not know that you have tried to contact them. Also, if you call a lot they will know that you are not going to give up until you talk to them.

NB: Yes, can you tell her that Joan Curtis from Newcomers called to schedule a time to bring her a gift bag.

S: Oh, well, just a minute.

Remember that this person is your in with the boss. If you are in anyway short with them, you can forget the contract with the company because this person is your gate to the decision-maker! Always try to be as nice as possible to anyone on the phone. They often hate salespeople, so the nicer you are, the better your chances.

NB: Thank you.

S: This is Miss Soandso, can I help you?

NB: Yes, thank you for taking time to speak to me. I am Joan Curtis from Newcomers and I would love to schedule a time to come see you and bring you a gift bag and share with you a little bit about what I do.

S: Well, what do you do?

This is your true chance to shine. If you can get her interested, you definitely up your chances to win a contract from this company. Remember to keep it simple. You want to see this person. Let them see your product. Really try to get an appointment with them.

NB: We are a welcoming and referral service for the (your town) community and we personally deliver sponsored gift bags to newcomers and first-time home buyers in the area. I would love to talk to you about getting your information out to new customers.

S: Well, uh... what does that cost?

When you are first getting started you really should be flexible with your fee schedule. This way you can get some incoming funds to take care of future bills. Just make sure you let them know you are giving them an introductory offer.

NB: Normally we have a fee of \$105.00 a month, but I would be willing to negotiate a price for you that would work with your budget. This would be an introductory offer that is only being offered during the month of January. What would be a good time for me to stop by?

“What would be a good time to stop by,” is a closing statement. It is important at this point to get an appointment set. You don’t want to waste this busy woman’s time. You want to let her know that you respect her time. Try not to stay too long on the phone.

S: Well, hmmm, let me see, I don’t know....

NB: Is there a time of the day that is less busy for you?

S: Yes, Tuesday mornings are the best time.

NB: Okay, Tuesday morning at say 10 am?

S: Okay, now what was your name again?

NB: Joan Curtis, and my company is Newcomers. Thank you Miss Soandso. I look forward to Tuesday morning at 10 am. Good bye.

Now you will want to confirm this appointment on Monday afternoon. This way you do not waste your valuable time either!

You want to have some ideas of ways the business owner will want to promote her business and also of questions she is going to ask you. Have answers ready for her so you look like you know what you are doing. I remember my first sales call was with a Pharmacist. He was quite intimidating. I was prepared and I got the contract. Be prepared to answer this list of questions.

How does this work?

I will usually tell the potential sponsor my system from A to Z. How the deliveries happen, who does the deliveries, and that sort of thing. Let them ask questions during this time.

Where do you get the names?

This is your “trade secret.” You want to tell them you create the list yourself from several different sources. One of your sources may be the Utilities Company. They will ask you if that is the place and you say, “Yes it is one of several places I research names from.”

How many new people move in every month?

This will depend on your research. I give an average number. Let them know that is it less in the winter and more in the summer.

How much does your service cost?

This is your decision. From your research you decide what you want to charge.

Do you provide the information or do I?

Again, this is your decision. Some services will charge for the printing.

When do you do the deliveries?

This would be something that you would want to let them know you will get the deliveries done by this date ... end of month or something like that.

Do you provide the list of names and phone numbers with the list?

I do. I would suggest that you do too. Telemarketing is a great way to do follow up with the list.

How much more is the list?

Do you want to charge one price for the service and one for just the list? It is up to you.

How did you get started doing this?

Tell them it is an idea you got from a friend that does it someplace else or share with them about Bizymoms.com. You choose how you want to answer that question.

OTHER QUESTIONS

- ◆ How effective has this been for your other clients?
- ◆ Can you create a flyer for me?
- ◆ When do I have to have my information ready for delivery?
- ◆ Do you have a contract?
- ◆ How long do I have to stay with you if this doesn't work for me?

You may get some of these questions during your phone call to the sponsor. Answer some of their questions, but let them know it would be easier if you can bring them a bag and let them see it.

What Do You Take With You For Sales Calls?

Ideas! As I was saying before, you really want to think of ways this sponsor would want to promote their business. For example, I was with a client and we together came up with "Get Acquainted Offer, Let us introduce you to savings!" Another one of my sponsors has a gift certificate that encourages the person to "come in and get away from the stress of moving, receive a facial for \$19.95 regularly \$65.00." The sponsor is going to be looking at you as the professional. Try to think of something that might be a good promotion or slogan for them to offer.

A sales presentation folder would be valuable to you also. I would try and keep things simple. Make a sales presentation folder with a binder that you might find at an office supply store. Make a nice cover on your computer for the folder. You can keep all your information together in one place. You will look put together and it will keep you on track when you are talking to the sponsor. It will help you have an outline to follow when doing your presentation without looking unprepared. The other benefit is that you will always be prepared before you go to a sales call. You will not have forgotten anything. I put several contracts in a folder so to have them handy to give at a sales call. If you can, it is always good to get a signature at the first sales call.

DO'S AND DON'TS IN A SALES PRESENTATION

I don't want to offend anyone, but some of the most common mistakes in sales are not something that is common knowledge. A great source to get from your local library is any of the several Zig Ziglar audio and videotapes. He is one of the best known teachers in customs of the salesperson. I would HIGHLY recommend that you view his tapes as much as possible.

Some of the basic mistakes that are made are so simple they are easy to overlook. Here is a list of common, but fatal mistakes:

Not allowing the sponsor to sit down before you do. This is a sign of respect.

Not listening to the sponsor's concerns and addressing them.

Have you ever had a salesperson not let you finish your sentence? As much as you want to jump in and interrupt them to answer their concern before they finish saying it, DON'T. Restate their concern as a question and then answer the question. When it becomes a question, it is no longer a concern or a problem. It becomes a simple question with a solution.

Example:

S: Well, the last time I advertised in The Daily Sun it didn't get any response.

NB: So you have advertised before, but not received a response? Well, let me tell you the great thing with Newcomers is you have a list to do follow up with. Most forms of advertisement do not provide you with the names and phone numbers of the people receiving their publication. I have the unique ability to do just that. I can give you a new list of newcomers and first-time homebuyers every month. This gives you the ability to call and follow up with each of the people who receive a gift bag monthly. The people who do follow up with this list are the ones who have the most success with our service.

Being unprepared in or unorganized at a sales presentation.

This is a fatal error. If you are shuffling through papers and unsure of what your trying to convey to the sponsor, you make them feel like they weren't important enough to spend any time preparing for. They will also feel as if you aren't really sure of what you're doing. When you are prepared, you also are less likely to get talked into giving away your service. People will try and take advantage of your good nature if they see an opportunity.

Follow up not being done in a timely manner.

Don't schedule so many appointments that you cannot follow up with the contracts you're working on. You may have someone, who is really interested, but you don't call him or her back for two weeks, you just lost that contract. Try to limit yourself to working two appointments a week until you can get good at scheduling your family and your business together.

Something you may consider doing is always carrying a package of thank-you cards, stamps, and your address book with you to appointments and soccer games. This is a great time to write a little note to a potential sponsor to let them know that you are still interested in getting their information into the bag.

Not being honest with the sponsor.

Lying will bite you in the backside if you are not careful. It is always best to be honest with the sponsor rather than make up a story. If you are late to an appointment for example, just say I am sorry for that. If you give them an excuse, you loose any ground you may have gained in winning this sponsor's business

Underestimating the sponsor's ability to see a salesperson verses a true, real businessperson.

You are new at owning your own business. There is nothing wrong with you being new. Don't try to be something you're not. You are a CEO of your own company, but not all CEO's wear 3-piece suits and talk the talk. If you are yourself with a potential sponsor, then you will be much more successful.

TIP: A great source to get from your local library is any of the several Zig Ziglar audio and videotapes. He is one of the best known teachers in customs of the sales person. I would HIGHLY recommend that you view his tapes as much as possible.



CHAPTER 6

WHAT TYPE OF PRESENTATION SHOULD I DO?

Creating your gift bag and mailing list for sale.

Well, here is where we are going to have some fun. I love the creative part of my business. You really can do anything you want for your newcomers business. I use a gift bag with my company logo hot stamped on the front in hunter green, but you can use anything to present your sponsors' information. Remember that your packaging is what will help you sell your product. In doing my research I found newcomer services that used anything from baskets to envelopes, and some that even used folders.

GIFT BAGS:

I use a brown bag that is a craft sack with paper twist tie handles. My goal was to give the newcomer a bag that they can use again. I ordered my bags from [Neil Trowbridge of BNB Systems](#) in Tulsa, Oklahoma. My cost per bag with hot stamping is 0.51 per bag for 1000 units. I believe the start-up cost for a plate was around 100.00. Call Neil and he will give you a current price. BNB SYSTEMS INC. (1-918-664-4345)

If you want to go to the extra expense, you can decorate your gift bags with balloons, raffia, ribbons, flowers or anything you want to. I chose not to do this at first because of the cost involved. Now I am considering doing it. I have seen many different supply houses online that you can order these types of supplies from. If you find one you like you might want to post it on our message board on [Bizymoms.com](#).

FOLDERS AND MAILERS:

I think this is a good idea for newcomer's information. I think that if the newcomer has a folder to keep his/her information in that is neat and easy to reference, they may use the gift certificates more quickly. I have a competitor who seems to do very well with this presentation. You may decide on having your folders being preprinted with your logo on them, or you could buy plain folders and place a printed label on the front of them.

This would still be very attractive and the labels could be used for other things as well, like envelopes.

When dealing with a mailer, you may want to compare the cost of stamps verses gas for delivery. Also remember that if you have a mailer, then your sponsors will need to have a piece that will be limited in size. My sponsors provide their own printed material and my thought is that if they are paying for them, they should be able to choose which size they want their flyer to be. The flip side to

this is that if you have a standard size for flyers you may be able to provide the printing services for a small fee and increase your own profit margin.

CREATING YOUR LIST OF NAMES TO SELL

How you design your list is very important. If you design your list and then change the design several times, it can become frustrating to the sponsor. You want to make your mailing list usable and easy to read. You can create it in several forms such as mailing labels or a spreadsheet.

Mailing labels are expensive to provide, but a master copy that is created to fit into a particular label would not be. The sponsor can have it on file to make copies when they need to. Shop for a standard label size at your local office supply store. You can suggest to the sponsor to buy a certain label to use for follow up mailings.

I have chosen to create a spreadsheet in Microsoft Excel. I have provided a sample of the spreadsheet below.

Newcomers
November Mail list

First Name	MI	Last Name	Spouse	Address	City	ST	ZIP	PHONE
Robert		Bishop		1009 S Smith Ave	EDMON	OK	73034	555-1212
George	E	Farrer	Beth	129 W 1st Ave	EDMON	OK	73003	555-1212
Cynthia	R	Hall	Sean Richman	1212 Rock Bridge	EDMON	OK	73034	NP
Rory		Curtiss	Adria	2405 Rudy Ave	EDMON	OK	73034	555-1212
Henrik		Smith	Doris	1208 Lois Lane	EDMON	OK	73034	555-1212

NP = Non Published
Blank = Not Available
1 of 5

POBOX 30037
Yourtown, Yourstate 73053

My sponsors enjoy that it is easy to use for telemarketing services. I also provide the list via e-mail as well as a hard copy. If you were familiar with Excel, it would be easy to set this format. You can place your name on the top of the page by using the Header/Footer option. I provide the phone numbers unless they are unpublished. If they are listed as non-published, I earmark that by NP, if phone service is not established I leave the phone number blank.

TIP: I would strongly suggest you keep a back up disc with your lists on them. This way if anything was to happen to your computer, you would always have an extra copy.



CHAPTER 7

WHAT TYPE OF CONTRACT DO I USE? A contract template for you to play with

I have inserted a copy of the contract that I use. Please understand that the laws in your state may be different than the ones in my state. Please use this as a template only. It would not hurt you to have an attorney look over this contract and make any changes necessary for you to use it in your state. I do not want to have someone just copy this and then it not work for them. I will not be responsible financially to anyone who does copy this document without advice from council. Now with that said... the contract.

MARKETING SERVICES AGREEMENT

Contract for marketing services (the "Agreement") made between _____ of _____, (herein referred to as "Client") and YOUR BUSINESS NAME HERE, with its principal place of business in Oklahoma County, Oklahoma (herein referred to as "Agency") (Client and Agency shall be collectively referred to as "Parties.")

SECTION ONE

Agency shall at all times during the term of the Agreement act as independent contractor. Nothing contained in this contract shall be construed to create the relation of principal and agent or employer and employee between Client and Agency.

SECTION TWO

The Agreement shall be for a term of _ months, automatically renewed by a monthly agreement unless Client provides written notice terminating the Agreement to the Agency. Said written notice shall be provided to Agency no later than thirty (30) days prior to the expiration of the term of the Agreement. Written notice of cancellation of the Agreement will be sent to the Agency's address as shown on the Agreement, or such other address as Agency may provide in writing during the term of the Agreement.

In consideration of the services to be rendered to Client by Agency pursuant to the Agreement, Agency shall receive monthly compensation payable on the **15th** day of each and every month during the term of this contract. The Agency's monthly compensation shall be determined at the following rate:

Client shall reimburse the Agency's costs in reproducing the Client's printed advertisement or other marketing materials at the rate of \$0.10 per copy. Client shall pay said reimbursement within ten (10) days receipt of the Agency's bill for document reproduction by Client.

SECTION THREE

Agency agrees to deliver Client's advertisements, merchandise or other marketing materials during the pendency of the Agreement. Client's printed advertisements or other printed marketing materials shall be restricted to one 8 1/2" by 11" page of paper. Agency may, in its sole discretion, waive the size restrictions for printed advertisements or other printed marketing materials. Client's merchandise or other non-printed marketing materials must be of a size and in a form acceptable to Agency in its sole discretion.

- Client shall provide the Agency with the items to be delivered, in delivery-ready form, no later than ten (10) days prior to the first day of the month the items are scheduled for delivery (the "Delivery Month"). If Client fails to satisfy this requirement the Agency shall, at its sole discretion, exercise any of the following options:
 - (a) Deliver the items during the Delivery Month;
 - (b) Deliver the items during the month following the Delivery Month; or
 - (c) Return the items to Client.

SECTION FOUR

In case of any error or omission in the advertisement by the Agency, the extent of the Agency's liability shall be limited to pro rata abatement of the charge paid by Client to the Company for services rendered.

SECTION FIVE

Client warrants that it is authorized and entitled to advertise, market and deliver all materials presented to Agency for delivery. Client warrants that it will indemnify the Agency against all claims, damages, demands, or liability whatsoever arising out of or in any way caused by or connected with the materials delivered by Agency on Client's behalf. Further, Client warrants that it will indemnify the Agency against all claims, damages, demands, or liability whatsoever arising out of or in any way caused by or connected with the any products, foodstuffs or other items delivered by Agency on behalf of client.

Client shall further indemnify Agency for any suits, claims, damages, costs or expenses arising in connection with false, defamatory, obscene or otherwise objectionable advertisement, including advertisements that invade the privacy of individuals, which advertisement has been delivered or published by Agency.

SECTION SIX

This Agreement is made in Oklahoma County, Oklahoma, and the laws of the State of Oklahoma shall govern its interpretation and execution. Any claims, lawsuits or complaints arising from the interpretation, performance or construction of the Agreement shall be brought exclusively in the District Court for Oklahoma County, State of Oklahoma.

SECTION SEVEN

This Agreement embodies the full agreement of the Parties and shall not be modified by the Parties except by mutual written consent.

Dated this ___ day of _____, _____.

“Client”

Name: _____

Address: _____

Phone: _____

By: _____

Title: _____

“Agency”

Welcome Home Edmond, L.L.C.

P.O. Box 00000

Edmond, Oklahoma 00000-0000

(405) 555 -1212

Fakeaddress@fake.com

By: _____

Title: _____

SPECIAL NOTE FROM THE AUTHOR: You can use this contract for your own, just make sure you want to offer the same type of services that the contract is written to offer. You can change them yourself and then take them to an attorney to have them look it over. It would probably cost you a lot less to do that then to give it to them to spend time with. Most lawyers charge by the hour. My attorney wrote this contract up and it cost me around \$3000.00 dollars. You are really getting your money’s worth on this ebook!



CHAPTER 8

WHAT DO I DO WITH MY KIDS? From the stay-at-home mom to the work-at-home mom: tips for transition that worked for me!

You are about to make the exciting journey to become your own boss. When you work out of your home, you may have your children at your feet. How do you get anything done when you are a mom of two and a business owner? Be smart about your time. Take advantage of Mothers-day-out programs or swap babysitting with another mom business owner in your area. Or ... you can do what I do and have an in-home nanny. Hire a college student to be there with your kids a couple of days a week in the afternoon. I have a fabulous sitter (thank you Stacey) whom, if it weren't for her, I would have never had time to write this book.

I choose to start this business so I could be with my children. I couldn't imagine shipping them off to a babysitter every day while I worked. I enjoy having the ability to walk out of the office and hold my son if he is having a bad day, or sit down with my daughter and play "Barbie Stuff" with her. I love my kids, as I am sure all of you do too. Don't sacrifice time with your children to start your business.

TIPS AND SUGGESTIONS: THINGS THAT WORK FOR ME!

You will LOL when you hear me say this, but ... Give yourself a title! I am Joan Curtis, Director of Marketing. There are several reasons I do this. One is that I can tell salespeople that I am not the decision-maker if I don't want to talk to them. The other reason is perception. If I am the Director of Marketing or the Director of Operations then I am not the only person that works for my company. I look bigger! It makes people more comfortable to work with someone who is part of a team than to hand over they're advertising budget to one person.

Accept help from others is another piece of advice I would give to the bizymom! If you are trying to get your business going, you are going to need help from those you love and trust the most. Let others give you ideas and suggestions. Let them help get your foot in the door with a business. You can do this, but why do it alone!

Also, I would like to suggest a program for your billing. Peach Tree is supposed to be the one that is the easiest to use and the hardest to make mistakes on. Any good tax preparer or accountant would know what program this is. Quick Books Pro is also good, but easier to make mistakes on. Be careful, your books are very important. Make sure you have everything up to date and correct.

Be realistic in your expectations. Don't expect to make \$100,000.00 the first year. Remember you are a brand new business. It takes most companies at least five years to turn a profit. I had a profit early and got excited, but I also had set backs too. Be prepared to work hard for a while. You will make it! You can do it!

Last but not least, ENJOY YOURSELF! If you're working 70 hrs. a week and not taking any time to enjoy yourself and your family, then you are in it for the wrong reasons. You have to make yourself take some time off. You really could work all the time. Please, do me a favor, and your family a favor. Get off a couple days a week. If Saturday and Sunday are your favorite days to spend with your family, don't give that up.

FINAL COMMENTS

I want to wish you much success in your new venture. I really do enjoy what I do, but what I enjoy the most is the opportunity that my business has given me. I have had the honor of working with people all over the country and consulting with them. I have been able to help people start an exciting time in their lives. Plus, I have been so honored to write this book and add the title "Published Author" to my list of things I have always wanted to do and have now accomplished! I will be available to you all during the chats every other week. Take advantage of that time to come and share your ideas and successes with others and feel free to ask questions. Visit our message board and share the burdens and disappointments with us too. We are all Bizymom.com sisters! I am so honored to have been able to be a part of your lives for this short time!

Now go and get em'!

Sincerely,
Joan Curtis

Glossary of Terms

This is an overview of some of the terms that I use in my welcoming biz and a little explanation as to why. I know that some of this is self-explanatory, but I don't want to leave anyone with doubt of what I am talking about.

Contract Labor: A great alternative to hiring someone to work for you. Contract labor is someone who works for you by contract and is responsible for his/her own taxes.

Cost Comparison: A comparative rate sheet that you can use when marketing.

Synergy: This is a term you may come across when talking to salespeople. It means to work together by networking for one another. You can get leads this way and it is a great way to increase your business.

Sponsor: Advertiser or Client. The reason I call them sponsors is because they do just that...they pay to sponsor their information in the bag. I address them to the newcomers as sponsor also; I let them know that their gift bag has been provided to them by the businesses in the bag and to please solicit our sponsors.

Marketing: This is the term most accepted and is referred to rather than selling. You would say I am in the Marketing, not I am in the sales.

Lead: A potential sponsor for you. The newcomers are leads to your sponsors.

Mailing List: This is the list I provide to the sponsors, it includes every person that receives one of my gift bags.

Marketing Service Agreement: This is the contract between you and the Sponsor. You are providing Marketing Services to them by providing them leads.