

# IT'S RAINING CLIENTS

FIND THE RAINMAKER INSIDE YOU

*A Entrepreneur's Guide to Originating Clients with Ease and Grace*



HOWARD WOLKOWITZ

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Cover and book design by David Bricker.

ISBN: 978-0-9971042-0-2

## **PERSONAL MESSAGE**

I have never considered myself a great salesperson or wanted to be known as a great salesperson.

YET, all the successes in my career have been due to my ability to generate meaningful relationships.

I believe that anyone can create relationships, customers, business and revenue, if they really want to.

**I am committed to your commitment**

## INTRODUCTION

No matter how great your command of the language is, how great your skills are, how great your knowledge of the law is, and how great your attitude is, it won't make a difference if you have no one to tell your story to.

This book will teach and inspire you to:

- 1) Identify the distinctions between working *in* your business and *on* your business.
- 2) Develop business through market segments.
- 3) Understand the importance of a marketing plan.
- 4) Create your brand.
- 5) Understand the difference between marketing and originations.
- 6) Understand the difference between a practice and a business.
- 7) Realize returns on business development investments.

# IT'S RAINING CLIENTS

FIND THE RAINMAKER INSIDE YOU

Whether you are just beginning your business or have been in business for a while, creating your own clients can be fun and it can be scary. Reaching outside your comfort zone can create anxiety.

This entrepreneurs' guide is about confronting what's scary. The moment you sign your first client, the results and fun of rainmaking begin.

A rainmaker is:

- A person who makes things happen.
- A person who brings in business.
- A person who develops relationships.
- A person who has established a reputation for honesty and integrity.

This book assists entrepreneurs with staying ahead of the business development curve. In a world of commoditization, personal relationship development and building networks is essential to creating and maintaining clients and your business.

The importance of business development originators in businesses has never been greater. Entrepreneurs have long recognized that although they may be astute at their trade, they may not be as adept at cultivating business. Yet, when asked which business owners make more money, have more control of their business, have more job security, and command the respect of colleagues in the firm, the answer is always the same: “The relationship masters.”

**In the world of business, originators are entrusted with a firm’s most important asset: clients. Originators are the face of the firm. They are the ones who manage the branding process.**

Client development is a career asset management strategy. Your career is an asset. “There are two types of business people: those who work for entrepreneurs and those who work for customers.” One creates income; the other *wealth*.

Business development has grown into a job classification in the professional service industry. Many

people think they want to have their own clients, but never take the associated actions.

Not all people are comfortable networking or asking for business. The reasons vary.

Though business development can be profitable, not everyone is interested in being a business owner and/or business generator. It takes a lot of time, energy, and a commitment to develop business and that means time away from family attending events, conferences, dinners, etc.

When people say they are not salespeople, what are they actually saying? Are they saying they do not want their own clients or are they saying they are not willing to invest the time, energy, and expense to develop business? People are content to work with clients from entrepreneurs and value the trade-off between making the most money and quality of life.

These “client service technicians” are critical to businesses. They support business originators in living the firm’s brand commitment and delivering quality services. For people interested in pursuing clients, the professional technology of creating business is both an art and a science.

### **(ROI) RETURN ON INVESTMENT**

ROI represents results versus investment. ROI can mean spending \$5000 to sponsor an event or function where you obtain a new client who you bill \$20,000. ROI can also mean spending \$500 to join an organization where over the next year, you create new clients and bill them \$20,000. ROI is a direct cost-benefit relationship.

### **(ROT) RETURN ON TIME**

ROT is a vertical model. Vertical networking is narrow and deep. Vertical networking is about getting deeply involved in only one or two organizations. You become personally involved and more intimate with members. You develop more meaningful conversations and hopefully more trusting relationships. Vertical networking usually pays higher returns on time invested.

Horizontal networking is wide and shallow. When your model is a horizontal networking model you are involved in several organizations as an attendee only. Horizontal networking is usually superficial, not focused and intentional, and not as effective.

**(ROR) RETURN ON RELATIONSHIPS**

When someone who knows, likes, and trusts you says, “I didn’t know you did that,” your ROR on that relationship is zero. Your friends and family may know you are an entrepreneur, but this will not help your career if they have a problem, and you are not associated with the solution. Make sure people in your circle know what you offer.

**(ROL) RETURN ON LEVERAGE**

Leverage is about positioning yourself as a resource and a solution provider. Once you are known as a resource, people will reach out to you for direction and advice. Your return on being a resource will be more referrals and introductions because people feel safe and confident asking you to help them. Return on leverage can also occur when entrepreneurs create referrals to other entrepreneurs.

**(DOA) DEAD ON ARRIVAL**

Many people attend events and spend their time hanging out with their buddies. They play it safe, don’t extend themselves, and may even leave pretending like they accomplished something. Some are terrified at being in a room of strangers and are happy when the event is over so they can leave. As far as being effective marketers, these business owners are dead on arrival.

## **MOMENT OF IMPACT**

Events happen in life that require an immediate call to action. Often, when a person suddenly needs a service provider, even though they may know several service providers, they will ask others for referrals. At that moment of impact, when a person needs a service provider and knows you, why do they ask for referrals from others? The reason is because they lack the confidence in the people they know.

When this happens, consider it a breakdown in your communication and brand management.

## **SOURCE AND CREATE YOUR OWN CLIENTS**

- Do what it takes to develop your own clients.
- Develop an ideal client profile.
- Identify organizations that have your ideal clients as members.
- Create an action plan to create meaningful relationships with ideal clients.

## **MAKE CLIENT CREATION A PRIORITY**

- See yourself as a business originator.
- Become comfortable meeting and greeting new people.
- Learn to ask others for business or referrals.

## **MEASURE EFFECTIVENESS**

Effectiveness is a result of a combination of intentional, actionable and coordinated activities performed consistently over time. It's easy to spend money developing business; the key is to have a high level of results without a corresponding high level of expense.

## **DO WHAT IT TAKES**

- Commit to spending smart time away from your family to prospect.
- Develop a process to source and create new business.
- Constantly ask for business.

## **DEVELOP AN IDEAL CLIENT PROFILE**

- Know your core expertise and the profile of your ideal client.
- Learn the best places to meet your ideal clients.
- Be able to quickly explain the value you bring to your ideal clients.

## **IDENTIFY IDEAL NETWORKING ORGANIZATIONS**

- Be clear about your unique value proposition. "I am a coder or in marketing," doesn't say

enough about your uniqueness and value.

- Be sure the organizations you affiliate with include people you really want to meet. Do your research before you commit to joining an organization.
- Regularly attend ideal events and *participate*. Business development is a contact sport. Participation is critical to obtaining results.

## **BUILD YOUR OWN ADVISORY GROUP**

Find like-minded energetic leaders and networkers. Do fun things together, share contacts, discuss opportunities and be there for each other. Great teammates watch each other's backs.

Create your own business networking group and choose your teammates. Create an agenda of what you are up to and whom you want to meet—a specific person or type of professional, or someone from a particular company.

Create a memorable value proposition that will be remembered by customers.

Leaders know that customers don't buy products; they buy solutions to their problems.

Create a simple Vision Statement for yourself:

*My expertise is in \_\_\_\_ and my ability to \_\_\_\_\_  
is very valuable to my clients.*

Creat a Mission Statement for yourself:

*I will have one lunch per week with prospective centers of influence.*

*I will attend at least one target event per month.*

## **LISTEN FOR OPPORTUNITIES**

While most entrepreneurs are astute *technical* listeners, many are not trained to listen for business opportunities. Some people call this social listening. Many focus only on the specific tasks at hand without developing the rapport with a client that enables them to provide a true value-added service.

Business owners must be more to their clients, prospects, and friends than service providers.

A successful client relationship is built on clients thinking of you not only when they need your service, but also when they need a trusted referral.

Part and parcel of listening for opportunities is recognizing the resources your company makes available through its staff, clients, and the relationships it maintains in the community. The firm's employees must be aware of all the services within the organization.

Educating the employees within a firm about resources beyond themselves and the people with

whom they regularly interact is critical to success at growing a business. Entrepreneurs should be able to distinguish their firm's abilities or unique value proposition in a brief conversation.

### **CENTERS OF INFLUENCE**

Centers of influence are professionals who establish “know you, like you, and trust you” relationships with others. They can be attorneys, bankers, brokers, advisors, CPAs, and business consultants. The art of business networking is about becoming a center of influence by learning to recognize and engage new distribution outlets.

- Determine who your best referral sources are.
- Meet with each of them to determine what you can do for them.
- Explore what clients you may have or want to pursue jointly.
- Find out how you can be a resource for them and their clients.
- Send them articles of interest.

### **BE KNOWN IN YOUR COMMUNITY**

When your name is mentioned in a room, make sure at least one person in that room knows you. Start to build a presence as a community partici-

pant, community leader, and most importantly as a community giver. Give time, money, energy, services and leads to others. If you are going to be known, be known as a community giver, not as a community taker.

Your ideal clients are always nesting in plain sight.

## **ORIGINATIONS**

**An origination** is a transaction between two parties where the client receives services in exchange for money. Originations are the process of converting a *potential* customer into an *actual* customer.

## **MARKETING**

**Marketing** is the activities associated with selling a service. Marketing cultivates awareness and draws potential clients toward you. Marketing is everything done to acquire clients and maintain relationships with them.

We may think we are marketing when we tell people who we are and what we do. Marketing is more than telling; it is a message to the marketplace that *positions* your business. Marketing can appeal to a broad or narrow niche. Marketing, positions you as the “go-to” expert in a particular area.

## **LIFESTYLE MARKETING**

Develop your business as a *lifestyle!* Brand yourself as the “*go-to source*” for providing solutions inside your field of expertise. Relationship building takes time; make it fun.

- Merge your passions with your business.  
Promote yourself within your ideal market.
- Get involved in causes and organizations you love.
- Build marketing outreach around your family’s events, organizations, and associations dear to your heart and interests.
- Build marketing around your community leadership role, perhaps by being a board member.
- Prospect with a purpose. Before you attend functions, research the specific people who will be there. Determine who and how many people you want to meet. Do you want to meet CPAs, insurance agents, stockbrokers, or business owners?

## **YOUR MARKETING PLAN**

Your marketing plan is critical to determining and delivering your message through every aspect of your communication with both clients and prospects. Your marketing plan is also critical to the cost effectiveness of your marketing efforts. Without a plan,

how will you be able to determine if your strategies, messages, and actions are properly aligned?

Steps to creating your marketing plan:

- Identify your niche
- Position your business
- Develop your marketing plan and budget
- Track your results and make adjustments

Your marketing plan should tell your community who you are and *why* you do what you do. They don't care *what* you do because endless people do what you do. Explain your qualifications along with your offerings.

Your marketing plan should include a calendar and a budget. It can be as simple as having a dedicated lunch each week with potential clients, or joining, attending, and taking on a leadership/sponsorship role in an organization.

Develop your marketing plan to address market segments. Are your customers:

- Individuals?
- Small, medium, or large businesses?
- Private or public companies?
- Not-for-profit or for-profit companies?
- One-time clients or ongoing clients?
- Other professionals?

Your marketing activities will vary depending on your answers. If you are interviewing for a job or presently hold a job, the following questions will be helpful in determining the support you will receive from your employer:

- What community organizations are you presently involved with and why?
- What relationships and opportunities have already come from these organizations?
- Is there a marketing budget for engaging with these organizations and others?
- Is there a formal associate development program that trains, coaches, or offers internal business development support?

## **BRANDING**

Branding and marketing is *not* originating.

Branding and marketing is *passive*; originating is *active*.

Marketing is what you do *before* you meet someone.

Your brand image is how the market thinks of you.

Marketing professionals design strategies by focusing on analysis and process.

Marketing involves branding, and originations involve living the brand.

Origination professionals focus on cultivating relationships and clients.

It's all about helping others; succeed by helping others succeed.

### **PROFESSIONAL BRANDING**

Brand image is how the market thinks of you. For you to create a personal brand, the marketplace must see you as a solution for specific problems. Brand identity is how you *want* the market to think of you. When creating a brand identity, it is important to brand yourself as experienced and versed in a particular area. When a need for that specific area of expertise, service, or solution arises, you become the “go-to” person.

State your uniqueness in 25 words or less.

*“I am unique because ...”*

### **BUSINESS ORIGINATING IS A CONTACT SPORT**

People play professional sports to win, not for the exercise. There is only one winner in professional sports and in business: the person or team who wins

or the person or firm who gets hired. Business and sports are competitive, relentless, and unforgiving. In business you either get hired or someone else gets hired. If your career was a sporting event, the following might underscore your marketing strategies:

- The game I am playing is \_\_\_\_\_.
- I have the home court advantage because\_\_\_\_\_.
- I know the rules of the game I am playing.
- I have a plan to win this game.
- I put resources where results need to be generated.
- I am passionate about my plan.
- If an opportunity opens up, I will go for it even if it is not in my plan.
- If my initial plan doesn't work, I will quickly revise it.
- I know they keep score. I will focus on results and not on my intentions.
- I know my competitor wants to win, also.
- I take full responsibility for my plan and the results it produces.

## **BRANDS CREATE COMFORT**

Before you create your brand, you must create your own uniqueness. A uniqueness is a way of defining how you appear to a client or prospect and what

you are committed to. The way people see you and treat you is a function of the perceptions they have of you. Perceptions tell us where we can and cannot count on you.

## **YOU AS A BRAND**

Thought leaders and rainmakers understand the value of personal and professional branding. You have a *personal* brand and your firm has a *professional* brand. Your brand defines who *you* are, what *you* want to be, and ultimately how you want people to perceive *you*. Your brand is what you communicate verbally and in media.

Building your personal brand is also about connecting to people and the community as a person. The more you give to your community, the more it gives back to you. Community involvement introduces you to like-minded people who open up opportunities for socializing and provides venues to get to know each other without the pressures of work.

- A *personal* brand is your reputation in the community and marketplace.
- A *professional* brand is your company's reputation, an extension of your personal brand.
- Brands have key messages, slogans, phrases, taglines, images, and looks. A brand has a voice.

Your brand could be “big firm muscle,” “boutique concierge service,” or “the expert’s expert on \_\_\_\_\_.”

- You can also brand higher fees/ higher quality or lower fees/higher value (but not both).

A brand represents a company’s culture and your personality, beliefs, and actions. Brands are promises. A brand promise establishes what your client can expect from you and your firm.

*Is your firm or are you considered an expert in a particular area(s)?*

*What differentiates you as an expert? Why should you be hired?*

## **BRAND BEING A THOUGHT LEADER**

A thought leader is usually a person whose views and opinions are accepted as authoritative and influential. Thought leaders are recognized and respected in the communities. Thought leaders are seen as “go-to” sources in their areas of expertise. Their visibility is increased. They are usually accepted as both knowledgeable and influential. They move and inspire people with innovative, creative, and disruptive ideas. When the media wants an opinion on a controversial issue, they reach out to thought leaders. Being quoted assists in building a brand.

## **ACTION STEPS TO BEING A THOUGHT LEADER ORIGINATOR**

- Arrange introductions, referrals, and recommendations for *others*.
- Get involved with organizations at the *leadership* level.
- *Join* strategic networking groups, trade organizations, and referral alliances.
- *Create* intimate client events, lunches, dinners, and social events.
- *Track* and celebrate your successes.

Originations and business development have several components. If you bypass any of the steps, you run the risk of not achieving your intended outcome, which is having more clients. Business comes from people knowing, liking, and trusting you. The steps are:

- **Getting to know you:** Engage in social conversations that allow you to relate to others on a personal basis.
- **Getting to like you:** Be yourself. Find areas of common interest and passions in conversations. Do not present yourself as an entrepreneur yet, but as a member of the community with a family, hobbies, and interests.
- **Getting to trust you:** Consider the criteria oth-

ers use to decide whether or not they trust you. Be authentic, transparent, vulnerable, and above all trustworthy.

Clients want entrepreneurs who are leaders and champions *for them*. When you create “know you, like you, trust you” relationships, you create the foundation for sourcing and creating your own clients.

### **PUBLIC SPEAKING**

One of the best ways to brand yourself as a thought leader is to speak at venues and events where your ideal clients are present. Being seen on a regular basis increases your visibility and acceptance by others. Clients want entrepreneurs who understand their concerns and challenges.

### **CLIENT RETENTION, REPEAT BUSINESS, AND REFERRALS**

The cost of acquiring a new client will usually be greater than receiving repeat business and referrals. Cost-effective means retaining clients and receiving referrals from clients and others.

- Create touch points because out of sight generally means out of mind. Publish email or print

newsletters offering updates on relevant topics or court decisions.

- Hold luncheons in your conference room with other experts.

## **LEAD GENERATION**

A lead is an investment. The best way to create leads is to consistently brand your credibility, expertise, and experience. Lead generation is a contact sport where you get the opportunity to share your brand and message.

## **LEAD TRACKING**

Tracking leads and opportunities is critical to turning investments into income. Track everything. You never know where your next client will come from. Segment leads into hot, warm and cold categories. Leads can also be segmented into potential clients and centers of influence.

## **LEAD CLOSING**

A lead conversion is a return on your investment. Closings happen when you help clients identify problems and provide evidence that you can solve them. Closings also happen when you eliminate the fear clients have of making a wrong decision.

## **REFERRALS**

Let referral sources know exactly what your ideal client looks like. Tell your referral sources why someone should hire you. Find ways to reciprocate with referral sources. Learn who *their* ideal clients are.

## **SOCIAL MEDIA**

*Social Media can be your virtual showroom showcasing all your services and value proposition. The right* social media can be used to position you as an expert and thought leader. In the fast moving world of social media, thought leaders and rainmakers keep a pulse on the news and culture of society. Some thought leaders maintain blogs and voice their opinions through social media. As a result, they are often quoted and reinforced as thought leaders.

## **SEARCH ENGINE OPTIMIZATION (SEO)**

More and more prospects conduct Google searches before they agree to a first meeting. Make sure that every channel is consistent and delivers the message you want your customers to read. A few “party pictures” on your Facebook page can cost you a fortune in lost business. If you were your ideal client, would your social media presence create likability and build trust and confidence in you?

Channels include:

- Website
- Blog
- Facebook
- LinkedIn
- Pinterest
- Instagram
- Twitter
- Periscope
- YouTube
- Bylined email articles and E-zines
- Virtual Seminars

## **GOAL SETTING**

- Set specific goals for how many clients or how much revenue you want to generate. Don't try to bring in "as many clients as possible." Calculate your capacity and then make plans to grow, refine your client profile, or both.
- Develop a realistic timeline for these goals.
- Focus on what support you will need to accomplish your specified goals.
- Deliver a clear, powerful message of your value proposition.
- Be able to deliver your message in 60 seconds or less.

## **BUDGETS**

Marketing budgets can range from 5% to 10% or more of your gross income. Expenses can include:

- Social events
- Sporting events
- Charitable events
- Business or trade events
- Breakfast, lunch or dinner events
- Newsletters
- Social media
- Website
- (CRM) Customer Relationship Management

## **COMPENSATION MODELS**

A marketing plan should clearly define who and how partners and associates get compensated for bringing in clients. Don't reinvent the wheel only to end up with a flat tire.

- How are origination credits valued and whose client is it?
- How long will the origination credit continue for each client?
- Who determines if a case will be billed hourly, will be flat fee based, or a combination?
- If an employee gets a referral, whose origination is it?

- Is the value of one billable hour greater than or equal to one business development hour?

## **COMMUNITY INVOLVEMENT**

Community involvement is not about attending functions and working rooms. Everyone knows what an inauthentic, event-darting networker looks like. When you attend events, get there early. Look at all the attendee nametags, decide who you would like to meet, and then stand at the front door to greet and identify attendees.

If you don't recognize a company's name or a representative's name, Google them and decide if they would be worthwhile to connect with. Look at the nametags again to determine whom you think *they* might want to meet. Very often, I meet and greet by taking a new person with me and introducing him or her to my contacts.

People will make snap judgments about you based on what they see, hear, and sense about you. When you walk into a room, it's show time and you are on stage. Stay focused on why you are there.

Recommendations for creating lifetime relationships and clients:

- Leave your ego at the door.
- Get there early

- Have fun
- Say “hello” first and state your name clearly and slowly
- Look people in the eye and connect with them
- Always stand when being introduced
- Be involved
- Be interested
- Be brief
- Don't interrupt
- Be a connector worker
- Be a note taker
- Don't give your business card out until you have permission or a request for it.
- Follow up within 48 hours
- Don't accept a call unless it is an emergency when in the middle of a conversation.

As an entrepreneur, you create your ongoing employment by generating revenue.

- Being self-generating and self-supporting can be lonely, scary and uncertain. Be more motivated by the power that comes with having control of your destiny than by your fear.
- You are either an employee of someone else or an employer of yourself. To become an employer, you must have an owner's mindset. Self-

generating people always have an owner's mindset.

- When you train for a sporting event or a career, there comes a time when you must get on the court and compete. When you are the employer, you are always competing.

## **SUMMARY**

Origination leaders know what they have to offer customers and clients.

Building a business is about being a leader.

When leadership is present, client acquisitions are easier.

Clients want entrepreneurs who can solve their problems through leadership.

Leaders have brands.

The rainmaker inside of you can be your brand.

Your brand is your promise.

Your brand differentiates you from other vendors.

Your brand is derived from:

- Who you aspire to be for your clients.
- Who your clients perceive you to be for them.

Others will judge you by what you say and what you don't say. They will also judge you by how you

say it and why you say it. Be thoughtful and authentic in all of your communications.

Clients want entrepreneurs who are:

Credible

Clear

Concerned

Concise

Consistent

Committed

### **ACTION PLAN SUMMARY**

- Create an ideal client profile.
- Identify the best places to meet ideal clients.
- Be able to clearly verbalize your unique value proposition.
- Create a follow-up process for keeping in touch with ideal clients.
- Create new distribution outlets for your firm's services.

When you attempt to be branded for *everything*, you run the risk of not being branded for *anything*. Your brand is not your brochure; it is *you*. Once you, your values, your commitments, your personality, and your expertise are a brand, create a consistent tagline, message, and voice.

The only person you can count on is *you*. Be self-reliant. Employees create income; business originators create *wealth*.

You may have read this book the first time out of curiosity. Now read this book *again* knowing you can originate clients by finding the rainmaker inside you.

### **THE SECRET SAUCE IS NOT A SECRET**

You do not have to have a business to have an owner's mindset and become a successful business originator. Cultivate an attitude, conviction, and desire to be a leader. Have a say in your career development and destiny.

Progressive businesses create leadership tracks for young and entrepreneurs. If they don't, they risk losing their leaders to more progressive businesses. Leading entrepreneurs position themselves to establish successful businesses inside their groups once they have clients. Origination development is really about attorney leadership development.

*Entrepreneurs who have a business "do business"; entrepreneurs who have customers "have a business."*

The collective energy of entrepreneurs is powerful. Participants see themselves in other entrepreneurs who are working through their own process of creating a brand and strategy. Success stories of others provide confidence that they can do it also. Entrepreneurs begin to see how they can give and receive referrals from each other. Confidence grows as skills are learned, honed and tested.

**FIND THE RAINMAKER INSIDE YOU**

## **ABOUT THE AUTHOR**

Howard Wolkowitz is an energetic and creative visionary. In High School, he wanted to go to business college to learn about the world of business. He majored in industrial psychology so he could learn how people relate and work in a business setting. In graduate school, he majored in business management.

When Howard started his working career in 1974, events created a professional pathway. It took three jobs before Howard realized he could create his own life as an entrepreneur.

On his kitchen table, he created two businesses. In 1987, he sold one of the businesses to a Fortune 100 company. After his employment contract ended in 1992, Howard decided to create another new business in the financial services industry. 31 years later, Howard is still creating. A new book and seminar series shares the valuable lessons he has learned over the last 50+ years.