

The business plan that wasn't

Now how did that happen?

My associate and I had had two meetings in person with one particular Bay Street firm. Over the course of 3 months I had researched the company, made cold calls to finally get to the person in charge of marketing, written a perfect letter with some samples and my CV, made numerous phone calls, and finally nabbed the first meeting before they asked for a proposal.

They needed us, that was for sure. Their reports were deplorable—academic and unreadable for their intended audience. Our proposal to rewrite that special report was reasonable, and they told us there was no competitor they were considering. They liked us. At the second meeting, they invited two more of their training staff to attend, and we discussed the document in detail. They even talked about other documents they would want us to work on.

We shook hands and smiled when he said he would be in touch. As Alice and I descended the elevator, we were giddy with anticipation. This would definitely be a great client.

We waited for a week, no call. The second week, Alice said, "Maybe we should give them a call." I declined. By the third week, stress and doubt moved in. What did we do wrong? Don't they see the value we bring? Don't they see how much they need us? I left an upbeat voice message.

By the fourth week they had not returned my call. I had no other contracts, and rent was due. I was angry. At home I poured myself a goblet of Henry of Pelham Baco Noir, popped myself some popcorn, and seasoned it with sea salt and melted butter.

Mmmm, my favourite snack. I settled in to watch *Columbo* to take my mind off my anxiety.

At 8 o'clock the phone rang. "Laurie Soper."

I listened carefully. An unfamiliar voice, yet keen and earnest. "Oh yes....Uh huh....Right....Yes, yes, I would love to help you with that. It sounds very interesting. Say, Lee, how do you know about me?"

"My brother's girlfriend Michelle gave me your card. She was in your class at University of Toronto."

What on earth...? Michelle attended one class, and I never saw her again.

Lee was the president of a growing software services firm that boasted consistent projects in the provincial government. He needed to expand his clientele and the size of his projects, competing against some of the big-name software firms. He needed my help with a very important proposal.

I drove up to his office in Don Mills the next morning and discussed his needs. A couple of days later he signed a contract and gave me a cheque. We finished the proposal in a few days and he won the project. Lee became one of my most devoted and successful clients over the next three years.

My business success is about the classic contrast between these two experiences—one planned and laborious, the other by surprise with no effort at all. One failed in spite of all my most focused application, the other succeeded through channels beyond my control while I sat drinking red wine and eating popcorn.

This experience was not an aberration: it was typical. But even then, after 8 years in business, I had not yet figured it out. It had to happen one more time before the lights finally went on.

It happened ๑๕๑๖!

It had been a dry winter. Yet another hopeful bid for a large contract had failed. I was relieved and excited when my best friend called and said she would be coming to Toronto for a couple of days to visit her sister. I drove up and spent a few

hours gabbing with her and her sister after supper. At eleven, her brother-in-law walked in the door and joined the gab. He told me about his new job as a project manager and asked me exactly what I was doing these days. Half an hour later, he goes to bed.

One month later, he calls me and says his boss wants to meet me. In our first meeting, she tells me her computer architects and systems engineers are finding it a chronic struggle to produce reports that actually meet their clients' business needs, how can I help them? She says a quarterly meeting is coming up in Calgary, can I give them some ideas then? I catch my breath and say, "You bet I can." She signed the contract before the end of the week and I spent the next 30 days delving into information I had never seen before, language that was entirely new to me, so I could relate to all those guys in Calgary.

My two-hour presentation was a smash hit and they became my biggest client ever.

Win rate: ๕๑๖ percent

It was after this experience—after a full eight years in business—that I finally took off my blinders, turned around, and surveyed my company records. Hmm, let's see. Add up all the contracts I've bid on, all the clients I've tried to get through sales and marketing efforts, all the calls I've made, all the research I've done, all the newspapers and magazines I've read, all the directories I've leafed through, all the proposals I've written and letters I've sent, all the conferences and networking breakfasts I've attended, all the schmoozing, all the interviews, and all the times I've taken prospective clients to lunch—add them all together and then calculate the number of contracts I've received.

Zero. Zip. Zilch. Nada. A big fat donut.

Then where on earth did all these clients come from?

I surveyed all the contracts I'd worked on from Day One. All of them had been handed to me on a silver platter. I had done nothing to get them. They had all come to me. My clients had all figured out they needed my services before they called me

and I did not need to convince them. They were all referrals from somebody else, even though that somebody else may have never worked with me.

Instead of spending all that time, effort and money running around doing sales work, I could have been sitting down in my living room eating popcorn and drinking red wine.

In fact, I tell people that's my marketing plan. It's called the red-wine-and-popcorn formula. Magically, as I'm sitting there in my armchair, the phone will ring. It hasn't jinxed me, either, to discover the formula I had been unconsciously implementing all those years. It continues to work, like a charm.

The ironic thing is that now I make a living helping companies write their own sales proposals, and they come back to me because I have a substantial win rate. For myself, the win rate is zero. For my clients, it's in the 75 percent range. Go figure.

It's been happening *all* along

When I first set up shop as an independent communications consultant back in 1992, I set out to dutifully read some how-to booklets about starting a business. Okay, so I should print a brochure and send it out. Buy an ad in the yellow pages. Get an accountant. Incorporate. Lease office space. Buy some nice suits and a leather briefcase so I look successful. Create a website. Set goals. Write a business plan. Wear lipstick.

I'd had some rigorous sales training with Confederation Life Insurance back in the 80s, so I knew the basics. (I should mention that my win rate with life insurance was also zero.) I blitzed the software firms in the city, telling them I had arrived on the business scene and was at their beck and call. They needed me to write their user guides, because their user guides were incomprehensible. Did they want to meet me next Tuesday? I just happened to be in the area.

Nobody seemed to have a clue what I was talking about. "What do you mean, a plain language consultant? Like when you write for a certain grade level?"

As soon as I tried to answer that question, they suddenly realized they had to pick up their niece at the dentist's, could I call back?

Others were curt and dismissive. "How much do you know about programming language?"

"I'm not a programmer. I'm a plain language consultant. Our techniques depend on the needs of your audience, not on your subject matter. The principles are portable."

"Yes, but you have to understand what we're selling."

No, I didn't have to understand what they were selling. I didn't have to understand anything. That was the whole point. But how could I explain that to them? How could I convince them? It seemed futile. Nobody would bite.

One night I attended a meeting of a group I was volunteering for. They were writing their mission statement, and it sounded like something their lawyer might draft. I put up my hand during the meeting: "I'm a plain language consultant, so let me try my hand at simplifying that."

I sent them a revision the next day and never heard back from them, and never attended another event. But one week later I received a call from Leslie, whom I had met at the meeting. She was writing a pamphlet for public information for her non-profit organization and wanted me to evaluate it and make suggestions for clarity and readability.

One month later, I received my first cheque for \$90. She was thrilled with the work I had done on the pamphlet, but could only afford an honorarium.

I bought some Inniskillin Meritage Reserve and celebrated.

This was the rainiest summer in my memory. It rained every day, all day, for about 90 days. I remember looking out my living room and watching the lawn get greener and greener, and the leaves show off their sinew and shine. It was luxurious. I remember watching the BlueJays gear up for their first World Series championship, drinking Hernder Estate Baco Noir, eating a lot of popcorn, and reading Robert Service's *Ballads of a Bohemian*.

The Bohemian portrayed in his ballads lives by the skin of his teeth in wartime Paris. In tough times he learned how to make it from month to month selling his talent and staying close to friends. He lived each day for itself, unplanned. When someone published another one of his stories or poems, he would live like a king for a week, on red wine and fresh bread and fish and fruit, and sing and laugh and wander around for more inspiration. A month later he would again be wondering where his rent was coming from, and would get inspired and write another ballad, and just when his landlord had threatened for the last time to evict him, a cheque would arrive in the mail and he would prance down to the landlord's door with a broad grin on his face, pouring out apologies and brandishing a copy of his latest poem. Then he would be off to the local restaurant again for a meal to celebrate.

This guy inspired me. The key was to survive, and have as much fun as I could while building my business and my reputation. It was important to celebrate each victory, and to share my happiness with others.

A month after I finished the little pamphlet, the phone rang. A woman named Fran from another non-profit organization had heard from Leslie about the work I did, and wanted me to help them develop a guide. I zipped downtown for a meeting the next day.

They became my main client for the next 3 years.

In fact, that's how it *all* started!

The pattern of apparent happenstance started even before I opened my business. I blame it for the way I started my career as a plain language consultant. I had been working on my PhD at McMaster University in Hamilton and decided an academic career was not for me. I had become less and less tolerant of the convoluted, complicated, obscure language that was rewarded and applauded instead of clear thinking and analysis. Right there was a hint of my future. So I dropped out of the program and proceeded to set up dozens of information interviews to see

where my talents could be used. For a year I scrounged for my rent, as an office temp, a supply teacher, an extra in the movies, and a housecleaner. I might have made \$10,000 that year. I kept my position in the union for the teachers' assistants, and attended a convention in Toronto.

On the final night of the convention, a bunch of us congregated at Madison Avenue Pub in the Annex. François, a union VP at the University of Toronto, asked me what I was doing now that I had dropped out of my doctoral studies in English literature. "I'm trying to get a job as a writer," I replied. "But I'm having no luck so far. It's been a year, something has to happen." As I recall, red wine and popcorn had been a staple diet.

"You should talk to my friend Helen at the Plain Language Centre," he said.

The next day I called Helen. Two weeks later I had an interview with the Director, Dr. Mark Vale. One month later he hired me as a consultant, with a starting salary of \$40,000 and full benefits. I never looked back.

I asked Mark a few weeks later why he hired me while he had a drawer full of other applicants. He said, "You had experience from the other side. Many of the people who want to work for us are either recent graduates or else coming from advertising firms. You had varied experience in all kinds of places. It reflects a certain amount of versatility, and a broader base of knowledge."

He was a smart guy. I learned later, when it was time for me to do some hiring, that I would address the same issue.

Goodbye, reason: hello, rhyme

So here's the way your small business is supposed to evolve. First you incorporate, then you lease office space, then you print some stationery and business cards and a nice shiny brochure, then you open a bank account and hire an accountant, then you put ads in the yellow pages, and then you start calling. Clients start calling you up and giving you contracts. Big ones. You soon find you have more work than you know what to do with, so you hire some employees who make you look great and stay loyal to you

for decades. Eventually they take over and you can retire on the buy-out. Or you go public and make loads of cash from the initial public offering.

How boring. This entire scenario revolves around cash. So you spend 30 years drumming up your salary and your pension. Whoopee.

It's also unrealistic. I've read numerous stories about the ways businesses blossom and succeed, and few of them revolve around cash. If you want to start your own business, look at it like falling in love, getting married, or going to university. It's an adventure. You cannot predict what will happen or all the people you will meet and all the fun you will have. Don't limit it to the boring stuff. Nurse that twinkle in your eye, and watch what Life throws you.

Okay, I admit it: I'm an idealist. A hopeless romantic. I dance to Al Jarreau's "Roof Garden" scat, and still get choked up when I hear Amanda Marshall sing "I believe in you." I even write poetry once in awhile. But I'm also a successful businesswoman, professional and entrepreneur. Now how did that happen?

Here's my theory: it happened because I'm a Bohemian. All of my successes have sprung up organically just by being myself.

I'm not claiming that traditional sales methods don't work at all. I'm only saying they didn't work for me. Maybe that's because my desire, from the beginning, was not to make lots of money. My desire, from the beginning, was to help clients succeed, to enjoy life and have the time of my life. Good money became a side effect. Now my business is thriving, and my client base is solid and loyal. And I'm happy as a lark.

Rudiments of the Bohemian ethic

You will discover in these pages a wisdom that challenges some of your habits and assumptions about what works and what doesn't. To become a card-carrying Bohemian, you need to adopt an attitude of gratitude, a habit of responding instead of planning, and a willingness to pursue adventure for its own sake. You need to savour the simple, sensual things in life. You need to cultivate

your visions and follow your passions. Most of all, you need to luxuriate in relationships with other people and with yourself.

There you have it. It's the story of my own Bohemian business, and it can be yours too.