

Ian: 00:01 It's Ian Altman. Our guest this week is Zvi Band. Zvi is the cofounder and CEO of contextually, which is a CRM that empowers professionals in real estate consulting and other professional industries to build authentic relationships. In fact, in full disclosure, I use Contactually and we use Contactually in our business, not because they give it to us, but we actually pay for it. Zvi founded contextually in 2011 and after raising about \$12 million in venture backing and growing the business to tens of thousands of customers, they just recently sold Contactually to compass, which is a fast growing Unicorn, if you will, with over a billion dollars in backing. We're going to discuss the biggest mistake that people make when it comes to relationship marketing. We'll talk about how you prioritize the difference between what's important and what's urgent and specifically things that you can do to help stand out for your customers. You're going to learn a ton from Zvi band.

Ian: 01:07 Zvi Welcome to the show.

Zvi: 01:09 Thanks so much for having me in.

Ian: 01:11 Well, you know, as I mentioned in the Intro, so you just sold contractually and that's an exciting thing because now you've got, now you're part of compass and this whole new endeavor. But outside of that, what's something surprising about you that our audience may not know?

Zvi: 01:29 You know, honestly I think if you look at my external presence, um, Yo, you see kind of view, ouch. You know, like extroverted person, you know, like on stage all the time. Like obviously like Yo, you and I know each other. Like we can both be in rooms and working together. I'm actually an insane introvert. Like most of my friends and my family know me as like the quiet guy who doesn't talk. I'm like to, to the point, like freshman year of college, I seriously considered going home every single weekend because I didn't want to talk to people.

Zvi: 02:02 Um, so most people don't realize like, wait, seriously? I thought you were like, you know, the captain of the football team kind of thing. I'm like, no, no, no. That's definitely not me.

Ian: 02:12 Well, you know what, and it's funny for somebody who has been the CEO of a CRM vendor to now for people to hear that, I think it was pretty cool because it kind of highlights this notion of, and it debunks the, the idea that affective people in sales and effective leaders are all extroverts, which is not the case.

Zvi: 02:35 Exactly. Yeah. I mean I think, you know, as you unpack it more and obviously, you know, taught her, our friend Todd Herman has, you know, his book to alter ego fact, which

kind of expands more on this different persona. But for me it's more that I think because I am naturally not akin to, you know, to networking and to just going and working a room or reaching out to people out necessarily that well, um, it's caused me and others to be more, um, you know, strategic in that approach. And that's honestly a lot of what ended up, uh, going into this book is that, you know, you have to be intentional and in your approach and be thoughtful about what exactly you're trying to do.

Ian: 03:17 Yeah. And that that level of being intentional and having a process is obviously so critical and we're going to get to the book, success is in your sphere, but before we jump into that, what's the biggest misconception that you see that people have or mistakes that they make when it comes to building relationships in sales and marketing?

Zvi: 03:39 Yeah, I mean, I think the biggest mistake is because we are dealing with people, right? There's oftentimes this itchiness around you know treating that as a asset and a resource and therefore applying a strategy behind it. But you know, we really do root ourselves that, you know, if you believe that relationships are your most important asset than just like Yo, that financial asset or that home asset that you have, you'll, you need to be prescriptive and strategic in your approach that, you know, most people say, oh yeah, I just, I want to be better at staying in touch with people and I want to be better networking. But if you asked any of them, well, what are you going to do today to be able to further that goal? They wouldn't necessarily know where to begin, and so I think it's the you know that most people treat it as a new years resolution, not really a strategy.

Ian: 04:33 Yeah, no, I think that's, I think that's great insight because the one thing that I see with people, especially in sales roles, and I see this through the CSUITE, is people who will say, well, Gee, I don't want to bug this person. What in the way often rephrase it is I'll say, well, do you feel that you have something of value for your contacts and people who you should stay in touch with? Do you feel that from time to time you might offer something that could really help their business? And they said, yeah, okay. Then do you realize that by not staying in touch, you might be in a situation where they're struggling with something you could help them with and they just don't know it and neither do you, and then instead of it being a hunter and hunted mentality, it's almost more like a physician's mindset of, look, I'm trying to find people who have a condition that I can treat and if I don't reach out to them and check in occasionally, then I might overlook and condition that doesn't have to get so severe.

Zvi: 05:31 Exactly right. You know, I know the way that we phrase it, as you know, if you believe that people do

business with people they know, well, not only do you know they want to know the people that they're going to work with and therefore it's your job to be proactive and staying in touch, but it's also your job to make sure that you were building, you know, a business and a client base that you want to work with, right? You know, how, how many people do you and I know that have felt so close and connected their clients that they invite them to their wedding or their kid's birthday party, things like that. Now obviously we don't necessarily need to go to that extreme with every person work with, but to some extent, you know, I, I got this, you know, I got this advice very early on that a business is formed more by people you don't work with and by people you do. Um, and so that's why I think we should be intentional to make sure that we want to work with people.

Ian: 06:23 I love that idea because it's just too often people either look at it as, we're gonna reach out to this person right now because I think I have something to sell them or It's a matter of, I don't need to reach out to this person because I have nothing to sell to them. Instead of, Hey, look, if I maintain a dollar with this person, then I might actually be top of mind when they have the stuff that we're good at. I managed to be top of mind when one of their friends or colleagues at another company has an area where we can help them.

Zvi: 06:54 Oh yeah, no I, and I love that approach and that's honestly, again going back to my own experience, you know, I am not the sales guy here, right? I am not the guy to drive a cold hard pitch and try and get you kind of the one call close that that is not my world. And so sometimes you know, to the point where I'm even just telling, telling the person I'm working with directly to them saying, Hey, I'm not trying to sell you now. I'm not trying to sell you tomorrow. I just want to make sure that you, you and I maintain a relationship or we're staying, staying relevant to each other. Such the point that when you are ready to buy, when you are ready to start exploring, you know, you're willing to reach out to me. And so my primary goal in business development is again, not to try and drive a sale, but to drive, try and make sure that they reach out to me when the time is right for them.

Ian: 07:43 Got It. And, and let me ask you this. So obviously, I mean I've been using Contactually for years, so it's easy for me to say good things about contextually and it really helps me and helps my team stay in touch with our clients. What I really want to focus on though, is on the book. So this whole idea of successes in your sphere. What prompted you, what was kind of the motivation to write the book now?

Zvi: 08:09 Yeah, it's really great question. And this is something that, you know, we, we took a while for us to get and get around this. So we created contactually, because I saw how

powerful relationships were in my business and wanted software to be able to help frankly plug the holes right. You know, I would meet someone for coffee and then two weeks later completely forget who they were or I was so focused on the top of my inbox that I would never think about anything else that happened afterwards. You know, send out a proposal and onto the next one, a client project will would roll off you'd never engage with them because you're so focused on what's next. And so that, and it being what we decided to solve with contractually. But you know, like any strategy, you know, contextually like needs you or that the whole idea of relationship marketing, you know, you need people, process and systems in place and contractually in what we, the software we built, well it's really just a tool, right?

Zvi: 09:08 But you know, just like you know, a chef's knife doesn't necessarily make you a great chef. Contactually doesn't necessarily make you a great relationship builder. And so people kind of kept coming to us and they were using Contactually. But there are thirsting more for like, well you have these buckets, well who do I put into buckets? And I see you have the ability to reach out to people and to build email templates and campaigns, well, what should I say? And when. And so we saw that we needed a pull up a level and capture all of the information that we've learned around how to build good relationships that came about by engaging with all these amazing Contactually customers over years and kept on one place. So yeah, I mean the book was definitely built as a way, you know, more as a companion to Contactually.

Zvi: 09:58 Again, just like, you know, you know, taking a really great yo cooking class will help you, you know, be a better chef alongside with those great tools, you know, the book would be able to help you be a great relationship marketer alongside of contactually or other tools you use. Um, and it was also honestly my personal mission is I wanted to make sure that, you know, the books last longer than software as we all know. Um, I wanted to make sure that the, all the knowledge we had captured over years and years would outlive you know, any one particular company or a piece of software.

Ian: 10:32 Got It. What are some of the, what are some of the most surprising things that, that you learned just from interacting with clients and people who have been using Contactually. What are some of the things that are in the book that maybe were surprising you?

Zvi: 10:47 Yeah, absolutely. I mean I think what came down Yo, after years of research behind the book and to understand that is it really comes down to one very simple issue that we face these days is the balance of doing what's important versus doing what's urgent. And I think that this, if I were to boil down all the issues and everything into one simple thing, it really comes down into that is that we, we as human beings, we are so focused on urgent

and technology companies and the world around us takes advantage of that. That we oftentimes lose sight of what's important in our business. And so, so much of this book is really built around fighting back against that and how do we make sure that we're willing to spend time around the important thing. Does that make sense?

Ian: 11:41 Yup. So, so give me, give me an example of that notion of urgent versus important.

Zvi: 11:47 Yeah, absolutely. So I'm a perfect example of this is just even in time management at availability, um, we, you know, relationship building as we were just talking about earlier in the show. Um, these are things that, you know, the relationships that we build may not yield fruit for a month, two months, six years, 10 years plus. But we know that the yield fruit, however, we are focused on what's urgent and what's in front of us. And so for example, if you're being asked to in the morning saying, Hey, I want you to write five letters to pass clients, just thanking them for their business, you know, hoping all is well, um, are you going to do that or are you going to open your inbox and look at the emails? There's just came in and start responding, right? We're driven more by the urgent activities rather than by the important activities. Um, so that's kind of, that ends up you're where the rubber meets the road as well. How am I going to spend my time today for something that might yield value in the next, you know, couple hours or something that may yield incredible value two or three years out.

Ian: 13:02 If you don't already have your copy of the new same side selling second edition, the one with the red cover, then visit same side, selling.com or good at any place. Books are sold. And if you do already have your copy, I would be amazingly grateful if you took the time to post an honest review on Amazon. Yeah. So it's, it's the notion of are you chasing the shiny object? Are you chasing and pursuing what you know as part of a process you should be pursuing? Meaning the person who I'm following up with who says, Hey, in 2020 we know we're going to want your help versus the versus the person who asked me a question about, hey, can we schedule a time to talk to this Thursday? The reality is that the person for the 2020 opportunity made strategically be more important, but I can easily get distracted by what's at the top of my inbox.

Zvi: 13:57 Exactly right. I actually had this issue even when starting Contactually, I was running a consulting business at the same time and Contactually nearly died multiple times in the first few months because you know, this is it. This is a bigger bet that as we clearly know who over, you know, I'm with the recent acquisition, you know, has definitely paid off, but early on, well, you know, I could work on this contextually thing that you know, may or may not work out. And if it does in one workout for years and years from now, or I've got this consulting project that, you know, if I've

send them a bill right now, they'll pay me, pay me within 30 days. Right? That that's definitely the kind of struggle that we all face. Got It. Got It. And so another really good example that, you know, we, we kind of often comes down to is, you know, people net naturally necessarily, you know, spend a lot of time figuring out, well who do I need to talk to?

Zvi: 14:51 And as you know and can talk actually that's really around setting up your buckets and the right way. Yeah. Well as you know, as humans, we kind of have of this Yo, this desire to bring order to the chaos. And so when we're thinking about structuring our relationships, it's often built around organization, right? I want my past clients over here, I want my sales prospects over here. I want my family over here, I want my college buddies over here. I want my yo networking group over here. But that doesn't always necessarily line up with what's best for our business. So we, we talk about in the book this whole need for prioritization, not order. So what prioritizing means means thinking about, well, what am I business goals? Who are the types of people that fit into those business goals and which are the people within those types that are most likely to be able to help me contribute to that business goal.

Zvi: 15:51 So that, and when you look at that, and if you were to put those lists side by side, yes of course is a fair bit of overlap, but those lists end up being fundamentally different, right? I may meet amazing, amazing people for you know, for lunch one day, but the truth of the matter is that they're most likely not going to be able to add any kind of value or contributed in any way to my overall career goals and I to them. And so those are people that again, as interesting as they may be, as important as they may be, as many Twitter followers as they may have, let's face it, they're not going to drive the needle, um, you know, over the long period of time and vice versa.

Ian: 16:32 Yup. So, so for organizations who are, are trying to work on this relationship side and maintain these connections and build that, that connections such that people, when a need comes up, gee, you're top of mind, what are, what are the two or three things they should be doing that can really move the needle?

Zvi: 16:55 Yeah, absolutely. So I mean I think it's in star, I think it's the number one thing that you have to start off with is outlining your goals, right? And again, all of us know that well we want to be better at relationships or be better at networking. Well why, like what are you actually trying to achieve? And again, you know, some people just will say, Yo, and we see this all the time when people sign up for Contactually. Well you know, if you just say you want to network or keep in touch with people, well what results would you be able to see over the next six to 12 months that will tell you you're doing a good job, right? Why are you willing

to spend time with this? Right? If this is just something to keep in touch with your college buddies, well that's not going to be as important for you as some kind of business goal or career you have and therefore it's less likely that you're going to be successful with it. So we always make sure that yeah, everyone outlines their clear goals, whatever it may be, just make sure you have something clear that will, you'll be able to track and say, yes, I was able to achieve that. Does that make sense? Yep.

Ian: 18:05 So the first thing outlined your goals.

Zvi: 18:08 Yep, absolutely. Um, and then obviously we talked about the prioritization aspect. Um, and then going back to this balance of the important versus urgent, then it comes down to is very simple, basic things that are easy for you and I talk about right now, but incredibly hard for people to actually implement and have the discipline around his block, off time in your calendar, right. Um, and just make sure that you have that time set aside to be able to very, very clearly focus on building those relationships, um, on being proactive with the people that you want to engage with rather than reactive to people to tell people you're talking about. So, and within that, I mean, again, there's a plethora of different strategies that you can be able to fill out maybe, or the person that you're writes five handwritten notes today. Maybe you're the person that you randomly scrolls up and down your phone and just kind of the, Oh, sends text messages saying, Hey, just thinking about you, maybe you're someone that you know, um, you know, finds the right gifts to buy for certain people and you're writing handwritten cards and dropping off in the mail.

Zvi: 19:16 It, that's almost less important. What matters is, you know, the binary aspect of are you doing it or not?

Ian: 19:23 Yeah. You know what I think that's so well said is that notion of are you doing it or not? It's really what it comes down to because people can have the best of intentions with them if they don't actually execute. It doesn't matter. I know that when I had Neen James on the show mean gave me this simple technique that I use. And embarrassingly, I don't use it every single day. And every time I do, I'm like, oh, I gotta do this every day. And I just don't have the discipline to do really anything every day except maybe shower. That's about it. But, um, but Neen says, yeah, each day write on a post it note is don't use technology running a posted note, the three non negotiable things you have to get done that day. Yep. And it sounds so simple yet doing that makes me so much more productive than anything else.

Zvi: 20:15 And you actually hit and you

actually hit on another really interesting point on the head, right. And you know, I'm not sure if you caught yourself, but when you were talking about the fact that you miss some days, um, you know, I think that the listeners could sense a little bit of shame in your voice. Right. And honestly, everyone does. Right? Right. And the problem is like, well, what do we do with things that were shameful of, right? We sweep it under the rug, we avoid it. It just becomes yet another mess. And that's something I catch myself with all the time. Right? You know, you plan to go the gym every day and then, you know, you miss it for a day and you miss it for two days and three days, and then you almost feel so bad about not going that you stop entirely. Um, and I think, you know, the, when it comes to that consistency aspect, right?

Zvi: 21:02 We all have to be honest that we're going to make mistakes. We're going to fall off the wagon as long as we're willing to pick ourselves up and say, you know what, fine. I know I suppose to send five handwritten cards every day for the past week while I haven't. So now that's 35 cards I need to write. Well, no. Why don't you just start off and do something simple, right? One card, right. Uh, send one text message to someone who you wouldn't have otherwise. Right? You know, start very small and just kind of slowly pick up that habit. Um, I catch myself and again, you know, it's easier for you and I've talked about incredibly hard to actually do and I suffer the same thing from time to time.

Ian: 21:42 Yeah. And I will tell you that the tool, I mean, and this is keep in mind so that people know, people know I use Contactually, I pay for contextually. So it's not like I'm, it's not like Zvi is a sponsor and I'm earning my dad. It just, I haven't used the product that works really well for us and it may not be the perfect thing for everybody. It fits our business really well. Um, that's where contextually stays on top of me because very often we will have an A rating contextually and almost equally as often we will have a B minus rating contextually because we're not following up on things or we've got people categorized in a way that we probably shouldn't anymore and all those sorts of things. But nonetheless, we don't say, oh, it's a B minus. Well then forget it. We're done. We've just say, all right, we have to do a better job at this and we kind of doubled down going forward.

Zvi: 22:33 Yup. Absolutely know that. And that's a perfect, that's a perfect way of perfect way of phrasing it. Um, the other thing that I think is pretty, really pretty related to this is that, you know, we in the book, um, Yo success in your sphere, we talk about the capital strategy, which lays through every kind of aspect of relationship building and the last l is for leverage. Um, and honestly, Contactually is really just a way of, you know, helping you gain better leverage, right? If you're able to, you execute a relationship marketing strategy that you're really happy about and you're doing it all via spreadsheets or whiteboards or stacks of

business cards on your desk or in your head, great, right? But think of like tools I can tap actually or others as simply ways to, you know, to give you more leverage, right? So, you know, Ian can, you and your team could probably do everything you know, in Contactually.

Zvi: 23:31 Um, you know, without, you know, without having the software, it may take a lot longer, right? And by taking a lot longer, that decreases the likelihood that you're going to be able to do it. But, you know, we always see advise, people search to search for these things that give you a little bit of leverage, right? So for example, you know, if sending a handwritten cards, you know, is an important thing, well great. Maybe you could have, you know, sitting by your desk, you know, a number of stamped envelopes and cards ready to go. So literally all you have to do is write the address and write the contents of the card are great. You're off to go. Or you know, maybe you buy, you know, 50 of Ian's latest book and you know, have that sitting by your desk ready to go. So all you need to do is write a handwritten card and drop it in the mail. Um, I have, you know, a list of, you know, of things that I find are really valuable and helped me in my career that I have, you know, on an Amazon list. So whenever I, you know, want to send out a gift, all I have to do is, you know, slack my virtual assistant and say, Hey, can you send this gift to this person? Right. And she knows exactly what to do. So it's small little things like that that gained you allow you to gain an incredible amount of leverage.

Ian: 24:45 Brilliant. Brilliant. Zee, where's the, where's the best way for people to learn more about the book where they can get success in your sphere and also where they can connect with you?

Zvi: 24:56 Yeah, absolutely. I'm so to connect with me. Um, as you know, there's probably only ones Zvi Band and in the world. Um, I'm trying, I'm already ranked on the first page of Google results for Zvi. Um, I'm trying to kind of keep raising it. So maybe at our, the book will help me get up there just a little bit, but you can just look for Zvi Band. I'm a at ski this on Twitter's ve been on Facebook. Um, but uh, the book, the website is success is in your sphere.com. That's just successes in your sphere.com.

Ian: 25:25 Excellent. All right, cool. Well thanks for sharing your insight, your wisdom and uh, I have no doubt that this book will be a tremendous success. So congratulations.

Zvi: 25:35 Thank you so much and, and not thanks your audience for a, for listening. I hope it was valuable with them.

Ian: 25:40 I have no doubt Zvi has so much great information. Remember to check out his book. Success is in your

sphere. Let me give you a quick 32nd recap of the key information I think you can use and apply to your business right away. First, remember when it comes to relationship marketing, don't be afraid to apply a process to it. It doesn't make it impersonal, it just makes it intentional. Make sure that you're not focused on getting it perfect, but instead recognizing that when you don't get things right, it's just incremental steps towards improving, which you're already doing. And I love this idea of prioritizing so that you're saying first, what are your goals and then what's important versus what's urgent. Because we often respond to what we think is important just because it's urgent or came up. Instead of focusing on the things we should be doing to grow our business. Remember, this show gets his direction from you, the listener. If there's a topic I should cover or a guest you think I should have on the program, dropped me a note to Ian and Ian altman.com have an amazing week. Add value and grow revenue in a way everybody can embrace, especially your customer customer.