



BOLD ENCOUNTERS™

**AN ADVANCED SYSTEM FOR LEADING WHAT MATTERS MOST
GET LEADERS UNSTUCK TO ACCOMPLISH ELITE RESULTS.**

© MARK SPENCER COOK
 WINDFALL PARTNERS

VISTAGE®

General Fit Introduction

The Vistage Worldwide Decision Model is an excellent resource for leaders to locate key choices needing to be made in the course of business success.



Vistage Worldwide®
Decision Model



Bold Encounters are elite actions based on 2-million CEOs and leaders who achieved:

- Outstanding *client outcomes*
- Remarkable *financial results*



Windfall Partners have:

- 4,000 client wins
- Chief-executive experience
- Tech exits and turnarounds
- Award-winning leader studies
- *NYT* and Amazon bestsellers

SELECT ONE FOCUS.

LET'S BEGIN IN ONE AREA TO EXECUTE ELITE RESULTS.

Bold Encounters is an advanced system of leading what matters most, getting leaders unstuck, and executing results. Bold Encounters can increase the odds of exceptional client and financial outcomes by 29x. And results have been proven by thousands of forward-thinking clients.

Chief executive and *New York Times* bestseller, Mark Cook, led the largest-ever studies of award-winning results by 2-million leaders. To begin, select one area to workshop with Mark:



A. Instill Potent Strategy

- Bold Purpose is specific.
- Bold Vision is vivid.
- Bold Missions accomplish.
- Bold Values are the clients'.
- Bold Encounters matter.



B. Execute Team Accomplishments

- Attain team targets with Bold Objectives.
- Support individuals' Bold Goals.
- Lead a culture beyond cooperative camaraderie.



D. Grow Sales w/ Proactive Referrals

- Focus on sales' #1 ROI.
- Get reference worthy.
- Create star references.
- Protect relationships.
- Gain outreach referrals.



C. Solve Problems & Innovate Quickly

- Engage leaders better.
- Discover gold problems.
- Immerse in client needs.
- Model leader outreach.
- Delight decision makers.

BOLD ENCOUNTERS™

A Set of Vivid, Confident, Courageous, and Strong “Inter”-“Actions”..... 6

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BOLD ENCOUNTERS™

Ten encounters by leaders raise the odds of exceptional client outcomes 11x & odds of financial impact 5x!

Great leaders lead particular steps forward to accomplish the right priorities at the right time with the right people. Urgencies are relentless, but greatness requires leading what matters most and getting others unstuck. Start a new era with the right path and vivid steps forward. Create Bold Encounters.



Bold Encounters are a set of advanced steps revealed in scientific studies and award-winning client successes. Bold Encounters are 10 leader actions with the right people and timing. These priorities guide your people, projects, and firm forward to cascading success. This complete set of *steps on a path forward* drives revenue, profit, and passion.

Leading great work is rare. Poor work is too. The chart below stacks a recent initiative for each of thousands of leaders. The stacks are organized from left to right, based on client and financial success. The most popular work is often mistaken as “best practice,” but it is just status quo. Great results are better and pop out, literally outstanding:

- "Poor" results (red) are fairly scarce, but...
- "Status Quo" (gray) is most of the work we see.
- "Great" work (blue) is boldly different *and* better.



- Is your plan a path w/ steps, targets & timing?
- Of your last 600 actions, which succeeded most?
- Which one action is most *innate* for humans?
- Which ability *distinguishes* humans most?
- How many changes can succeed at once?
- Would others say you orchestrate or dictate?
- Do you engage leaders in problem solving?
- Have you ever been stuck growing revenue?
- Would any of your leaders admit being stuck?

BOLD

VIVID, STRONG, COURAGEOUS, CONFIDENT, AND PURSUING THE IMPORTANT

Chief executives and leaders have people and needs competing for time and attention. Today, leaders need a precise path with bold steps, so teams can deliver greatness for clients. Bold is not overly aggressive but includes a few important and powerful elements that help lead better:



Vivid

- Clear
- Seen
- Sharp
- Distinct



Gravitas

- Purpose
- Serious
- Trustworthy
- Confident
- Humble



Strong

- Potent
- Enduring
- Powerful
- Great



Courageous

- Brave
- Valiant
- Gritty
- Dauntless

ENCOUNTERS™

CONVERSATIONS, ONE-ON-ONES, ZOOMS, MEETINGS, ALL-HANDS GATHERINGS, CONFERENCES, ETC.

Executives encounters affect employees more than most leaders realize. Yet hundred of situations in which we find ourselves have less positive impact than is ideal. The ten best predictors of leader success require readiness when we interact with those we lead. Prepare for each **Bold Encounters**.



Face-to-Face

- Eye Contact
- Personal
- Proximity
- Direct



Experience

- Fully Aware
- Participation
- Affected
- Learning



Consequential

- Energized/Sober
- Impactful
- Important
- Meaningful



Memorable

- Genuine
- Impressive
- Surprising
- Feeling

Key Reflections and Action Items:

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INSTILL POTENT STRATEGY

We tested 600 actions—a few priorities for the right purpose increased odds of exceptional results 2X.

Bold Purpose is the pursuit to fulfill specific needs for ideal clients and instill this passion in your people. Purpose is not just a statement of clichés like 83-percent of leaders use. Purpose means “the reason.” The reason you organized as a firm is to profoundly benefit people in your target market in precise ways. Continue to explain and engender Bold Purpose.

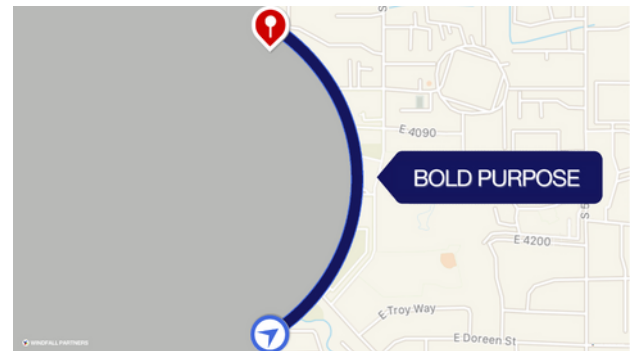
Gain clarity on who you serve best and the reasons why this ideal client needs you most. Ready yourself to clearly explain your business abilities to fulfill specific, key needs for your clients and do it from their vantage.

Great leaders instill a vivid, confident, courageous Bold Purpose with a strong belief.

Bold Purpose puts better client outcomes first and better financial results second. But instilling a passion for Bold Purpose broadly is a great predictor of leader success, raising both the odds of client delight 4x and profit gains 3x.

Your primary purpose is to fulfill key client needs. Saving Earth may soon become everyone’s personal purpose, but it is not the primary business purpose of most mid-size and small firms. Diluting too many firms’ purposes could end sustenance for enough people to overwhelm the planet. Specialization protects, make your ideal client’s needs primary. Then lead the fulfillment of five key needs responsibly.

Consider your Bold Purpose as a path for you to lead your people and clients on a journey to a better state. But you’ll lead one milestone at a time. Bold Purpose is “the big why” you make a difference for clients now and later.



Pursuing a path to a target is our most innate act. We do it all day subconsciously and consciously. A path is easier to follow than 1,000 scattered points, like a GPS path beats a folding map.

Bold Encounters: Instill five convictions in others about how your purpose makes a profound difference for ideal clients. Thirty minutes can cut through 600 proven needs to help. Plan Bold Encounters to instill this Bold Purpose:

- Who is your ideal client that you serve best?
- Which acute obstacle do you overcome best?
- Which of the most important, innate needs do you fulfill among 600?
- Which two or three do clients value most?
- How do your offerings differentiate you?
- Which of 25 profit levers do you pull for clients?

Key Reflections and Action Items:

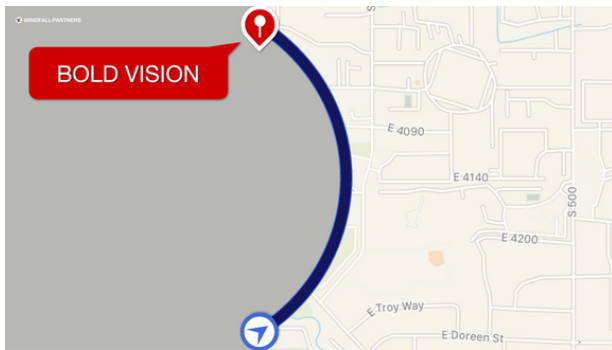
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INSTILL POTENT STRATEGY

A Bold Vision raises the odds of your people feeling passion for the work by 17X!

Bold Vision is a clear, meaningful future where you see clients benefiting more than ever. Imprint vivid details of this reality into every mind to foresee. Describe this scene as a **destination** at the end of a path (see Bold Purpose). Lead everyone to bring clients to this better state within five years. Check people's focus and recall often.



Circumstances change over time. Places, people, and needs won't be the same in five years. A Bold Vision is like a client oasis, just over the horizon, about five years out. By then, new talent must be delivering new ways to delight new clients in new settings. Pinpoint this destination at the end of a path for teams. Visionary leaders share long-term, real intentions.



Our brains' visual cortex has a lightning connection to our amygdala, the emotion and motivation center. Descriptions become visual cues that create comprehension and imprint memory of these scenes. The mind's eye surges to act toward such masterpieces in the future. Help your people step toward a vision.

Status quo leaders write vision "statements." But forward thinkers see vivid, Bold Visions and imprint them in the minds of others. They do this work that takes more than instinctive skill. Visionaries study in solitude then work to create these mental encounters verbally or with images. Plan Bold Encounters to set real visions often in a variety of settings. We can help.

Bold Encounter: Project a clear and meaningful vision of future client success. See this reality just beyond the horizon. Describe how things and people will be different in five years. Use five episodic details to clarify this vision as a destination. Plan encounters to imprint this Bold Vision into everyone's mind:

- Do you see a meaningful vision of client success?
- Do you envision this new reality five years out?
- Do you instill details to cause episodic thinking, our best thinking, and make the vision vivid?
- Do you imprint five episodic details to help minds see the vision at the end of the path?
- How often do you instill Bold Vision?
- How often do you check clarity of destination?

Key Reflections and Action Items:

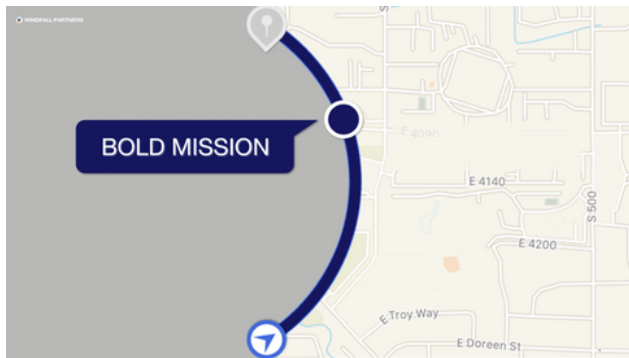
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INSTILL POTENT STRATEGY

Bold Missions raise the quantity of work deemed exceptional by 33 percent!

Bold Mission is a critical accomplishment. This major priority engages individuals, refocusing them on “something bigger than myself” for “someone beyond myself.” Missions unify teams as a big step forward, toward the vision. Being “on a mission” demands success of imperative, verifiable accomplishments.



Bold Encounter: Declare a Bold Mission toward your vision to accomplish a big step for clients within two years. This milestone must specify an accomplishment clearly (also failure). Invite everyone to opt-in to the mission.

Most of society goes on a mission to accomplish something specific in a limited time. JFK and NASA raced Russia to land a man on the moon and return him home safely. US military aims to free and protect cities. Missionaries convert a person or don't. Search & rescue saves lives or fails. Status quo leaders are almost alone in society with “missions” of clichés without targets.



- Is your mission as clear as a search & rescue?
- Is your mission a major step toward your vision?
- Have teams adopted a “larger than self” mission?
- Do they know its verifiable accomplishment?
- Do your leaders clearly reiterate your mission?
- Can your mission be accomplished in two yrs?
- How will you ensure inter-team cooperation?

Key Reflections and Action Items:

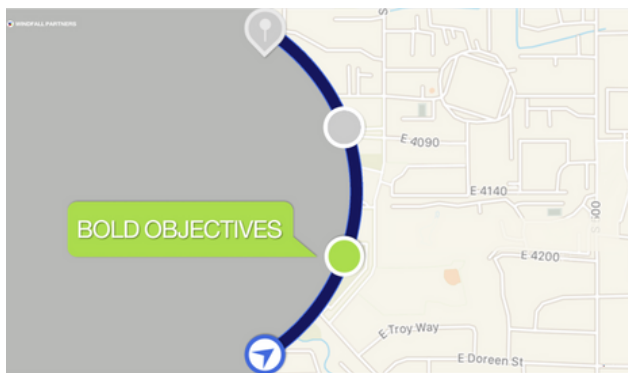
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EXECUTE TEAM ACCOMPLISHMENTS

Lead a cadence of accomplishing bold team objectives to increase the odds of great results 3X.

Bold Objectives are a **major team milestone** each **quarter**. **Invite every teammate to contribute** and also **share in the incentives**. As the deadline for the company mission nears, each team completes its **final quarterly objective in sync with other teams**.



People thrive when included on important projects. Find meaningful contributions for everyone to make to reach team objectives each quarter.

Each team achieves different objectives. And it is best for each to focus on less than three. Bold Objectives and focus are a team's friends.

Short weekly huddles help adjust and define next steps toward quarterly milestone(s). A non-negotiable, 13-week cadence of timed team huddles help reach quarterly milestones. Gain "buy-in" on objectives increase autonomy.

Rewards for attaining team objectives are best shared. Bold Objectives help cohesion on fairly autonomous teams. Hire the right talent that can share leadership. Most CEOs lead a dozen specialized teams or global divisions with a variety of sub-teams, so Bold Objectives vary.



Do your Bold Objectives create better outcomes?

- Do outcomes give clients great advantages?
- Do teams give clients meaningful experiences?
- Is there a great financial impact for both parties?
- Do clients gain long-lasting benefits?
- Is product quality pushed beyond expectation?
- Do objectives elevate work above expectation?
- Do objectives create positive client surprise?
- Do they engage employees in great work?

Bold Encounters: **Huddle** briefly as a team to set and report **progress weekly**. Then **celebrate success on week 13** (each quarter):

- Do you **invite individuals to adapt contribution**?
- Which teams **huddle weekly** to check progress?
- Which teams **co-lead objectives** quarterly?
- Which teams **share incentives** for success?

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EXECUTE TEAM ACCOMPLISHMENTS

Leader “presence” is a gravitas and “passion for purpose,” which raise the odds of great results by 7.5X.

Bold Presence exudes “serious” passion for purpose. Others experience your sincere belief in an important plan to help clients and to raise results. Which leader would you follow? One with charisma or one who conveys an important purpose and presents a trustworthy plan? Consider related, positive virtues:

- Trustworthiness*: To trust and be trusted.
- Motivating*: Providing a motive: a cause to act.
- Passion*: Intense giving of meaningful purpose.
- Gravitas*: Exuding an important focus in a serious manner causing belief, respect, trust, synchrony.

Great leaders are “positive.” They offer credible optimism, faith, and certainty in the face of challenges. We all affect each other’s emotions. People’s highly-evolved sensors for faces, eyes, movement, voice, and words trigger each other’s positivity (or negativity). Experiences also affect us. A “show and tell” in a “client space” creates emotions, thoughts, memories, and motivates action. Repeating emotions creates “ripples.”

Emotion we cause affect others. If a person recalls a positive (or negative) experience, it turns into a *feeling* or a “re-action” (for up to 20 minutes). If recalled again, the feeling can become a *mood* for half a day or up to six months. Repeating feelings even more hardens long-term memories, creating *passion* and affecting productivity. So verbalize sincere positives about each person’s work often.



Leader Focus

		Tasks	Relations	Projects	Synchrony	Culture
Transmission	Passion				#1 +27%	
	Ideas					
	Actions					
	Being					

- PAS·SION** /paSHən/ (original meaning)
1. a great sacrifice for others
 2. an extremely strong, compelling emotion

A personal sacrifice foregoes something for something beyond and “bigger than myself.” Sacrifice instantly creates trustworthiness. Hire positive people that care and give freely.

Bold Encounters: Share five reasons you believe in your Bold Purpose for clients. Detail a Bold Vision of future clients that benefit more. Enroll everyone in a Bold Mission to accomplish a priority this year. Ask teams to achieve two aligned, Bold Objectives this quarter with weekly progress huddles. Charge leaders to support personal goals weekly and remove obstacles daily. Instill plans creatively and often.

Key Reflections and Action Items:

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EXECUTE TEAM ACCOMPLISHMENTS

Leaders orchestrate co-lead a cadence of team accomplishments, raising the odds of great results 3X.

Bold Cooperation is to orchestrate. Hire the **right people** who **collaborate**. **Assign direction (path), priorities (milestones), and roles**. **Invite people to lead, cooperate, and contribute**. **Expect creativity and be accessible**. **Expect the cadence of accomplishment weekly then quarterly**. **Recognize any success publicly to define, encourage, and raise expectations**.

Expect leaders to share leadership. Expect experts to specialize but also to help lead in a flexible cooperation. Believe that everyone should lead at work. If each person should lead their career and lead most their work, then each should contribute to significant projects and help lead team cooperation. Few people's titles include "leader," so "lead" should be in everyone's job description.



A chief executive should orchestrate, keeping the plan and cadence front and center. Expect each team to monitor progress and develop autonomy. Orchestrate and sync to get more than strong supervisors, smart project leads, personal relationships, or even culture.

Great leaders ensure everyone coordinates in a cadence of accomplishment. Teams hold brief, huddles for 12 weeks (non-negotiable) to achieve quarterly objectives. On week 13, team objectives should be met, along with others' team objectives. And the year(s) final quarterly objectives are each team's contribution to the company mission.



Assign roles (see Definition of Terms in back), give clear direction, and set expectations, giving helpful feedback after tasks. Also, share incentives and recognize anyone who delivers small wins, big efforts, or exceptional contributions. Why? Public recognition, done well, clarifies expectations better than even instructions.

Bold Encounters: **Develop** and **orchestrate:**

- Do you have the **right talent collaborating**?
- Do leaders **share the leadership** of the team?
- Do leaders invite and **expect creative work**?
- Are leaders **accessible, humble, and flexible**?
- Do experts **understand other's perspectives**?
- Do teams **huddle briefly** on **weekly progress**?
- Do teams lead in a mostly **autonomous** way?
- Are exceptional efforts **recognized publicly**?
- Do teams **contribute to other teams'** success?

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EXECUTE TEAM ACCOMPLISHMENTS

Leading teams beyond camaraderie to esprit de corps increases the odds of great results by 7X.

Esprit De Corps is a deep sense of belonging and sacrifice on a team—a “spirit of oneness.” Esprit de corps requires **readiness to sacrifice for each other** to achieve greatness, “to have each other’s back, no matter what.”



Esprit de corps is not just moral and ethical commitment or loyalty. It is each member ensuring each other belongs and understanding each perspective. It is recognizing and articulating each teammate’s unique contribution and appreciating each as a person. It is the original meaning of passion.



Earlier we discussed that “passion” originally meant “sacrifice,” a selfless foregoing for others. Sacrifice is often made for the work, but Esprit de corps is readiness to sacrifice for each person too. Compassion helps, but passion raises cooperation, trust, and results.

Inclusion, **frankness**, and **encouragement** help, but **trustworthiness** really accelerates teams. When teammates trust enough to sacrifice for other’s success, hesitation on the team disappears. Speed accelerates. Sacrifice is a money maker. Trust is the graphite lubricating team synchrony, work, and results. Sacrifice creates trust faster than anything. Similarly, supporting adjacent organizations creates trust.

However, including people, although improving results in the long run, can be difficult in the short-run. It takes time to find a person’s unique contribution, but finding it is a long-term investment. Esprit de corps has incredible ROI.

“ We are the only animals on Earth that cooperate both flexibly and in very large numbers. ”

-Yuval Noah Harari, PhD, Author, *Sapiens*

Bold Encounters: foster a culture of esprit de corps, selfless sacrifice to help teammates:

- Have you **given up advantage to help others**?
- How well do teams **embrace new members**?
- Are new members expected to **embrace others**?
- Do you **commit to “have each others back”**?
- Do teams foster **positivity and happiness**?
- Do you recognize acts of **trustworthiness**?
- Do teammates **contribute to other teams**?

Key Reflections and Action Items:

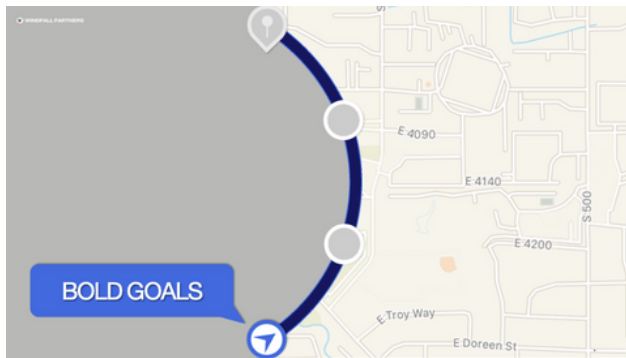
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EXECUTE TEAM ACCOMPLISHMENTS

Bold Goals lead to 33-percent more great work.

Bold Goals belong to **individuals** that aim to create **great work each week** in **daily** steps. Even work goals should be **personal**. As leader, **don't compel the sharing of goals**, but **encourage** people and **remove obstacles**.



Bullseye: 1. modern center of a target, nearly two-inches in diameter; 2. medieval nickname of a coin placed on archery targets (see later Five-Shilling); 3. center of business target with a date and two sides of value: first, a benefit to people (heads) and, second, financial result (tails). This is a more efficient set of criteria than SMART goals.

Goals create **improvement each week**. The unit of time for most work is **the day**, between sunrise and sunset. **Rise and race the sun daily** to create greater benefit. And create financial gain before sunset. Finally, take sleep seriously.

“Each of us was born to actively benefit others.”

—Ed Deci & Rich Ryan, Psychologists

Bold Goals raise results, rarely gained by status-quo firms. But you will change lives.

People don't really spend most of their life at work. Do the math for a week. People find about 50 hours for work and 50 hours for love and life, plus sleep, prep, commute, etc. If this isn't true for you, maybe read Bold Vision again. This time, make it about your personal life.

Don't give up on someone as you encourage goal setting. Keep asking to help and clear the path. Ask how it went each Friday. Offer feedback as forethought. Repeat this weekly.

Rethink setting annual, vague goals or even SMART goals. Be more focused not status quo. Orchestrate unique contributions weekly. Discuss the team's targets, then the individual bullseye: client and financial impact by Friday.

Bold Encounters: Support weekly goal setting in a positive, personal way. Enhance culture with goals. Be upbeat! Ask individuals in ad-hoc chats in hallways, conversations, or Zooms about their work and how you can help:

- Does your firm **support weekly individual goals**?
- Are your people **compelled to share** their goals?
- Do your leaders give **ad hoc support** everyday?
- Do leaders ask about **both sides** of the bullseye?
- What **percentage** of goals are reached by Friday?
- Do most goals reach **“the second finish line”**?

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SOLVE PROBLEMS: INNOVATE QUICKLY

Even great leaders hit obstacles. Success requires problem solving. Engage in the innovative problem solving used to create 4,000 client wins. It's built on the largest-ever study of award-winning pivots.



Innovate to solve problems with actions that

are proven to create business breakthroughs:

- Boost growth with referrals, the top bet in sales.
- Take the right steps to propel stuck teams.
- Solve problems to increase profit rapidly.

Status quo teams lag, as they brainstorm in offices or on Zoom. Award-winning teams take bold actions that gain rapid results. Try a couple!

Innovative problem solving raises the odds of profit gains by 5X and client importance by 11X!

Potential users of your work hold valuable insights. And the right context offers better solutions than your expertise alone. Ask the right questions, scout the problem onsite, and consult adjacent experts. Then converge on a pair of next steps to break through to remarkable results like these leaders:

“An IT project stalled, but we found a way and saved \$500,000 on Mark’s first day!” -Thomson Reuters



“Mark helped two of our firms. We avoided disaster with a focus he brought to leaders.”
-Kevin Childs



“Service declined, then Mark helped find \$145,000 for service labor on day 2!”
-Dena Peters, S.W.



“Our CEO began a CTO search, but Mark’s method got me promoted instead.”
-Jeff Stott, Extra Space

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SOLVE PROBLEMS: INNOVATE QUICKLY II

Brainstorming is to innovation what little-league is to professional sports. Solve people's problems like a professional. Rookies talk a lot. Experts investigate eagerly, as if the details of a problem were oxygen.



Bold Discovery is deeply understanding one prospect at a time. After brief forethought, 88 percent of great leaders ask a prospect to give a narrative of an recent problem, *then* they consider future success. This discovery raises the odds of mass client success by 4X and odds of profit gain 3X. Half of status-quo leaders never even consider client delight *before* offering a solution.

Bold Immersion is going onsite to search for opportunity in three ways. Great leaders scout prospect places for problems. They search faces for emotions and look for ways to make a difference. Such deep insight raises client passion for our work and impacts profits at shocking rates. While most leaders stay in their offices, greats go looking for answers onsite.



Bold Immersion raises the odds of client passion by 12X and the odds of profit gains 4X.

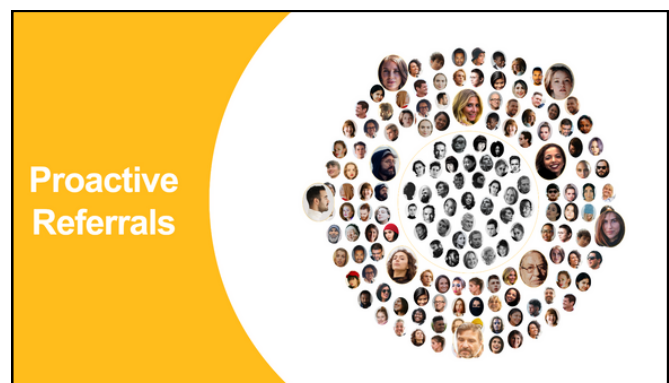


Bold Outreach is meeting to exchanging ideas with great leaders you don't know. Both prospective clients and "adjacent experts" help us see problems in a new light, spur breakthrough ideas, and find possibilities. A Purdue study found outreach brings more success than the status quo's solid management skills.* We found it raises the odds of profit gains 3X.

*Dr. Michael Glauser

Bold Outreach for Sales requires a *proactive referral program* to achieve all the encounters above with a prospective client. Approaching prospects well requires skill at the following encounters (see all three encounters that follow):

- Invite great clients to give testimonials.
- Invite great contacts to be references.
- Meet ideal prospects to gain insights.



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GROW SALES: PROACTIVE REFERRALS

Bold Outreach for Sales: A Proactive Referral Program

“Referrals...69% **faster close**.” (Nielson)

“With 10 to 30 percent close rates, referrals get **higher close** rates at 50 to 70 percent.” (Hubspot)

“Contact your inner then outer circle to increase odds of **profit impact 3.4X**.” (Cook, *Great Work*)

“4.2X odds of **new meetings** with B2B decision makers if you have a common contact.” (Hubspot)

“Which marketing or sales tactic has the **highest ROI**?...That winner is referrals.” (Steli Efti, *Forbes*)



Create **top-client testimonials** first:

- Target key client stars for video etc.
- Make requests with the right strategy.
- Make requests at the right time.
- Trigger continual client requests.
- Finish exceptional video & audio.
- Distribute insights with bold strategy.

Question: Do you believe your job includes a weekly project that helps you gain more expertise? If so, the following can help you meet new ideal contacts to lead, develop, and serve better than ever.

Your people’s contacts include a few top clients, possible reference-worthy stars. BUT **each contact** can be a ready reference when called with the right purpose. Mass referrals are possible if first meetings are Bold Discoveries not pitches.

References



References praise you. “Six-degrees” used to connect you with Kevin Bacon *and* referrals, but social media has cut this to three. Find ideal referrals just outside “mutual contacts” on LinkedIn, but call colleagues with purpose.

If your team passively waits for word of mouth or invitations to referral lunches, you are losing money. Have your people call with the right question for the right one-word answer to put them in meetings with new prospects.

Contacts



Referrals



Key Reflections and Action Items:

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GROW SALES: PROACTIVE REFERRALS

Great problem solvers amass 100 new possibilities, then converge on a synergy to be referenceable.

Bold Ingredients are the two best opportunities out of all 100 possibilities. Converge on the two most synergistic difference makers with profit potential to thrill an ideal client. Simplify elements of your offering if possible. Eighty-four percent of great teams experiment with elements of client outcomes to improve results. This focus raises the odds of both client delight and profit 3X.



Bold Delight is a subtle but profoundly different finish line for great leaders. The status quo considers work done when a task is completed. But ninety-percent of great leaders finish only when, at least, one client contact becomes reference worthy. Thrill a decision maker, end user, or key contact to raise the odds of widespread delight 4X. Great leaders only finish after getting a referral.

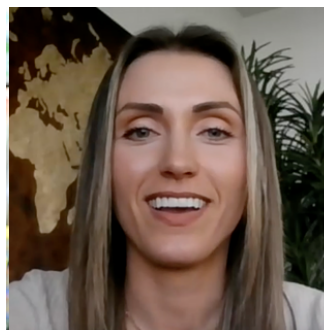
Innovative problem solving raises the odds of profit gains by 5X and client importance by 11X!

Pleasing everyone may be in your contract, but it impossible. Your personal mission is to delight, at least, one reference-worthy contact. Client decision makers are ideal, but win over someone influential.

“Leaders, don’t wait to work with Mark. You can’t afford to put off something this valuable.” -Butterfields



“Sales disappointed, then we doubled merchandise sales by millions with Mark.”
-Jeff Barlow, CFO



“Mark made a big difference! The day after we met was the most productive of my career!”
-Shayla Hubbard, Owner



“We have a shocking amount of revenue coming in, like airliners waiting to land!”
-Dallin Frampton, GBS

Key Reflections and Action Items:

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Definitions of System-Wide Terms

Bold: strong, courageous, vivid, important, meaningful, confident; with gravitas

Encounter: face-to-face experience with consequence and resulting memory

Gravitas: serious importance in manner—purpose, causing feelings of respect and trust

Lead: travel ahead to direct followers; orchestrate complex cooperation; or dictate

Work: physical or mental effort to create: an outcome, priority, product, joy, or profit

Achieve(ment): attain or complete a specific, noteworthy work

Contribution: complete work that adds necessary, well-received value to others

Plan: cooperation strategy with a sequence of steps to accomplish a priority

Market: an identifiable group of people or organizations that have similar needs or purchases (see Target below to specify)

Outcome: all consequences for everyone receiving, doing, and leading work

Focus: disciplined attention to one or proximate things while excluding lesser things

Aim: a specific movement or act to focus and removing attention on anything else

Priority: one to three actions or things, more important and urgent than any, to achieve a desired outcome

Milestone: one step in a sequence on a path; a target to direct aim, priority and progress; an intermediate point, directing: effort, distance, time, and rate

Target: a defined (bordered) object or person for an ideal outcome, requiring aim, focus, and effort to meet or attain

Bullseye: 1. modern center of a target, nearly two-inches in diameter; 2. medieval nickname of a coin placed on archery targets (see later Five-Shilling); 3. center of business target with date and two-sided value: first, central benefit to client (head), second, core financial result (tail): more efficient criteria than SMART goal.

Result: statistical or measurable portion of outcome, usually money or metrics

Outstanding: exceptional, standing outside status quo; among the excellent

Remarkable: surprisingly positive; compelling, noteworthy, worthy of mention

Finance: a balance, increase, or management of money; result of positive gain or acceleration of assets, revenue, or cash-in; net of decrease or slowing of liabilities, expenses, or cash-out

Delight: joy or fulfillment after challenge; other's desirable surprise with our work

Make a Difference: create significant value, advantage, or joy for other(s)

Lead (n): new person to evaluate or meet

Prospect: abbreviation for prospective client, willing to discuss business together

Contact: one in a variety of business people or acquaintances in life or online

Client: customer, patient, or recipient of our work; anyone we formally agree to serve

Ideal: an opportunity to thrive most while serving one who benefits most from you

Organization: group of people and assets united to accomplish a purpose by delivering value(s) to market

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Definitions of Terms (cont.)

Related to Bold Purpose

Purpose: the reason people organize; to fulfill specific needs a group is suited to help

Value: a priority of a purpose; anything valuable to people, including: progress, benefit, belief, money, experience, advantage, product, service, thoughts, or feelings

Path: a planned or paved route to a destination, making pursuit clear and efficient; a symbol of a clear plan

Perpetual: continuing into the foreseeable future (e.g. beyond five years, even forever)

Passion: strong emotion that compels a directed action, often involving sacrifice by one to help another

Instill: infuse purpose in others; to implant an important conviction in another's mind or consciousness using belief, creative repetition, influence, and time

Needs: essentials for human life and experience; among 12 types of 600 specifics

Practical: most literal, immediate, or obvious use of a product, service, or help

Primary: significance or precedence of a particular thing over others—first priority

Experience: meaningful activity or still state, as reported by one's senses, feelings, and thoughts—life itself

Obstacle: problem, roadblock, challenge, difficulty, or other cause of extra work

Differentiator: more than mere strength; a uniqueness among competitors

Related to Bold Vision

Vision (Bold Vision): is a scene we see in our mind but that is a reality in five years or a destination where we benefit others more than ever.

Episodics: standard details of any scene in life. For example, a future scene or vision may include (in terms of ideal clients) new and changed roles, practical and primary needs, problems, constituents, goals, finances, settings, and our role as guide, our partners, and new capabilities to help in new ways

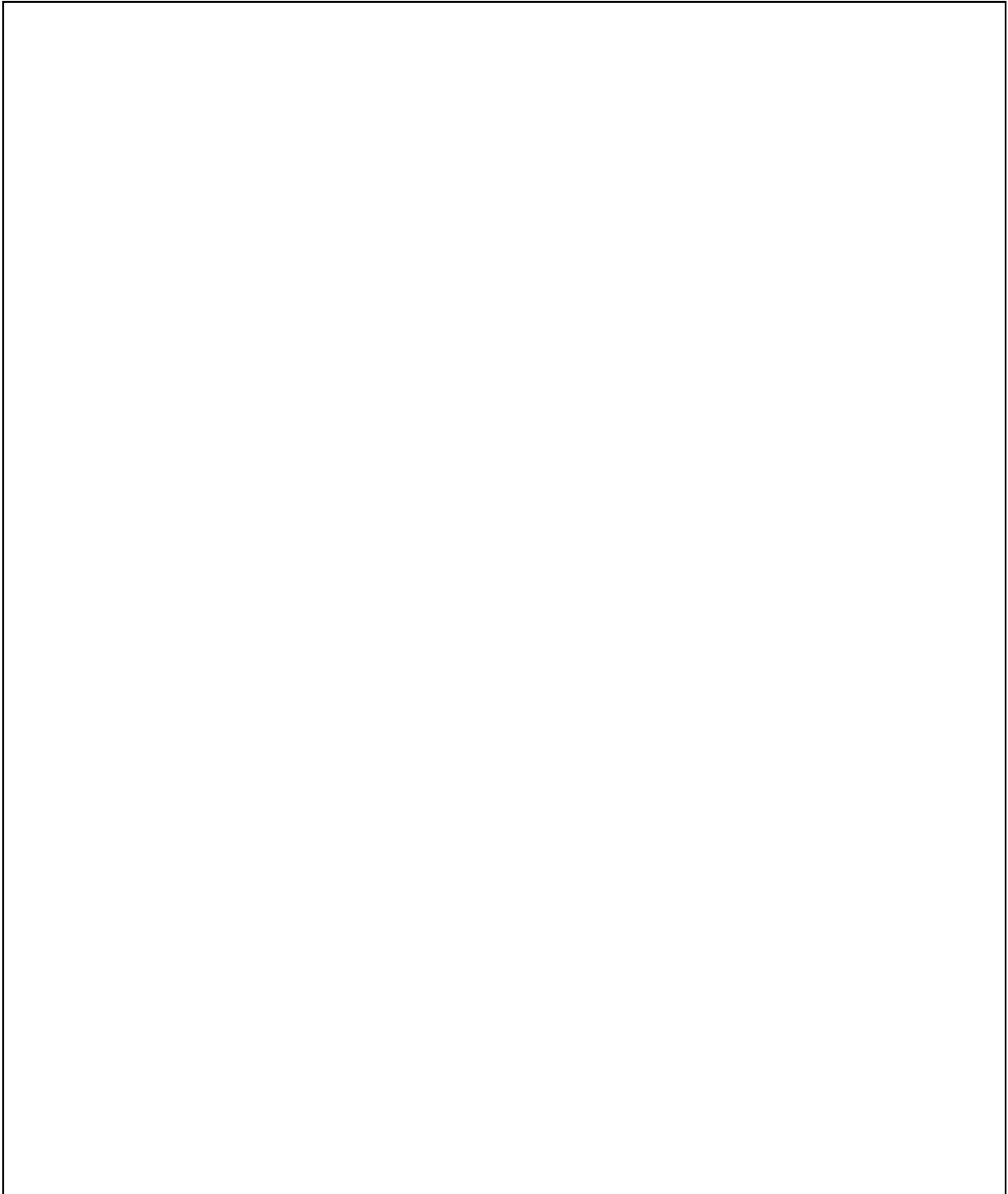
Long-term: about five years but needing more specificity (e.g. "in five years, by December 15, 'XX, at noon")

Embed: upon invitation, to firmly integrate ideas or an elaborate scene into another's consciousness and memory, so the mind's eye of the person focuses their thoughts, beliefs, understanding, feelings and even influences their decisions and actions with less effort. (see Bold Vision)

Destination: a target location guiding pursuit; a symbol of a desired, future reality attained through cooperation. (e.g. "Our people work toward a vision of a better client outcome and will not rest until we reach this destination.")

Note: Pay close attention to the terms Bold and Organization, Outcome, and Value, Client, Organization, Priority, and Outcome (see System-Wide Terms above).

Key Reflections and Action Items:

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Definitions of Terms (cont.)

Related to Bold Mission

Mission: a concerted effort to succeed at a crucial accomplishment(s) within a limited time (e.g. “The mission was a major step toward achieving our long-term vision”)

Accomplishment: target of a mission or aim to achieve a priority; the completion of a verifiable outcome (e.g. progression, benefit, result, or fulfillment of need)

Mid-term: around one to two years (e.g. “by next year, on December 15, ‘XX, at noon”)

Self-improvement: work on progress, benefit, or fulfillment of primarily one’s own needs (vs. accomplishment)

Collective: an organization or formal cooperation of all specialties, teams, jobs, titles, and occupations

Galvanize: spur a unification of people to focus on work that accomplishes an important, urgent outcome

Related to Bold Objectives

Objective: a thing aimed at or attained (original meaning); a team’s target or defined contribution to organizational accomplishment; one in a series of quarterly contributions for the mission

Team: A group of individuals cooperating to achieve shared objectives, often collaborating with other teams.

Quarterly: three months (a trimester or 13 weeks), a period in which teams work to attain a major milestone.

Weekly: a cadence of five consecutive weekdays that repeats, often a team’s unit of time for progress toward the quarterly objective (13 weeks)

Cadence: a rhythm kept to create a pattern of events; a pace with a dependable tempo of timing

Huddle: a brief meeting, often a timed 15-minute, standup meeting

Incentive: a tangible item or a more intrinsic event used to encourage successful completion

Share: in business, to flexibly cooperate or lead various specialties of team collaboration beyond one’s title. (e.g. The team shares objectives, incentives, and responsibility for leading huddles)

Accountable: one person with the opportunity to publicly present outcomes and results for a period

Responsible: a person who is needed and buys in to co-lead a specific contribution toward an objective

Collaborator: a person who sacrifices work or opportunity to contribute to any team’s objective

Champion: One who formally, vocally, and financially supports an improvement project in an organization

Stakeholder: Anyone with a significant interest, concern, or investment in a formal initiative in a business

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Definitions of Terms (cont.)

Related to Bold Objectives

Agent: an individual co-leading the work to drive a change forward, directly involved with the project

Advocate: Leaders who publicly persuade and remove obstacles for a project and build critical support

Supporter: a person (not the champion) who vocalizes support for the change, encourages, and helps

Enabler: Providers of necessary support, tools, or infrastructure for a team to accomplish a project

Influencer: a person with the ability to shape opinions, attitudes, and behaviors in support of a project

Facilitator: provider of data, timing, and facilitation of meetings and discussions needed for the project

Ambassador: a designee representing the project formally in public and internal communications

Implementer: each person responsible for executing the specific tasks and activities to align and accomplish a project

Note: pay close attention also to Quarterly, Milestone, Outcome, Focus, Priority, Target, Bullseye (see System-Wide Terms).

Related to Bold Goals

Goal: endpoint of one person's journey of struggle for success (original definition); an individual aspiration with a sense of agency, real personal growth; an achieved, self-directed progression.

Individual: a single quantity or entity; one person with matchless characteristics, qualities, and identity compared to others in a collective; an autonomous agent with one's original thoughts, feelings, and rights

Person: one human, with an original physical existence, consciousness, and capacity for rational thought and self-awareness; an individual with legal rights, accountability, and responsibilities

Day: the period of light from sunrise to sunset, this planet's time for work and activities before darkness, the time for rest and recovery; or the full 24-hour period denoting a specific calendar day

Voluntary: action, activity, or work undertaken individually without compulsion or mandate; self-motivation by passion, interest, commitment, or a desire to work for something bigger than oneself

SMART: an acronym by George Doran, for goals, standing for: Specific, Measurable, Achievable, Realistic, Time-bound. See more efficient, focused "Bullseye," a System-Wide Term

Note: Pay close attention also to Week, Focus, Priority, Target, Bullseye, and Result (see System-Wide Terms).

BOLD ENCOUNTERS™

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Mark Spencer Cook

Mark Cook, CEO, Windfall Partners, helps you execute Bold Encounters for remarkable results.

Which Bold Encounter will help your business the most?

Bold Purpose 	Bold Vision 	Bold Mission 	Bold Objectives 	Bold Goals
Bold Discovery 	Bold Immersion 	Bold Outreach 	Bold Ingredients 	Bold Delight