

This is an edited transcript of the June 12, 2013 SmallBusinessTalent.com podcast interview titled [Are You a Likeable Expert? Michael Katz on Marketing for Solo Professionals](#).

Announcer: Are you a hard-working, self-employed professional striving for small business success? There is help. Welcome to the SmallBusinessTalent.com podcast featuring candid conversations about successful self-employment.

Stephen Lahey: Welcome to the SmallBusinessTalent.com podcast. I'm Stephen Lahey, and I'll be your host. Today, I have a special guest on the podcast whom I've known since 2005. As founder and chief Penguin, quote, unquote, of Blue Penguin Development, Michael Katz coaches and consults with solo professionals. His specialty is showing them how to get clients easily and consistently without ever having to make a single cold call.

Since launching Blue Penguin in 2000, Michael has been quoted in the *Wall Street Journal*, *The New York Times*, *Business Week Online*, *Bloomberg TV*, *The Boston Globe*, *The Boston Herald*, and other national and local media. He is the author of three books and has published over 300 issues of *The Likable Expert Gazette*, a weekly email newsletter with 7000 passionate subscribers in over 40 countries around the world.

Michael has an MBA from Boston University, a Bachelor's in Psychology from McGill University in Montreal, and he also has a second degree black belt in karate and a first degree black belt in parenting—he has three kids—and he is also the past winner of New England Press Association's award for "Best Humor Columnist." Welcome to the podcast, Michael. Thanks for making the time to be here.

Michael Katz: Thank you for having me.

Stephen Lahey: Before we dig into our main topic, which I'd like to call the art of likeability and humor in marketing, can you take a moment to tell us a little bit about your life before self-employment and why you decided to launch your own business in 2000?

Michael Katz: Yeah, you bet. I have to say, my story begins with the idea that I never expected to work for myself. I had a very conventional

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family background in terms of no entrepreneurs. Everybody kind of had a job for a long time and I was on that path. I went to school, I went to business school, I went to corporate America.

But a few things came together for me in the late 90s. The Internet was really big, everyone was really interested in getting involved in it, and I certainly was too; and I also had this sense that I had kind of gone as far as I was going to go in corporate America. I was good enough to not get fired, but I was solidly middle-management and that was just about as far as I was going to go.

I also felt like I wasn't quite firing on all cylinders in the sense that a lot of stuff I was good at, writing, and even humor, didn't really relate to my job even though it was still in marketing. So it all combined that one day I just walked out the door, and that was in 2000.

Stephen Lahey: I have to say, as I've gotten to know you over the years, it's hard for me to imagine that you couldn't use your sense of humor in marketing. What were you marketing, by the way, why you were in the corporate world?

Michael Katz: I worked for the cable company, so I'm working for at the time—it went through many ownerships—but I'm working for a big publically-traded company in marketing and so, you know, marketing in a big company is not the sort of creative place that maybe we think. You're basically running a lot of numbers and tracking a lot of campaigns, and the times where you actually have the leeway to do anything beyond that are pretty narrow.

The interesting thing to me was this sort of humor thing was always this parallel track that lived mostly in my personal life. So that's pretty much the word people used to describe me. But I always thought of it somewhat like being an unusually tall baseball player—it's kind of interesting and once in a while it's useful, but not really important. That's kind of how humor was for me. I was the guy who when somebody left the company would do the roasts or whatever, but it really had nothing to do with my job.

Stephen Lahey: To be honest, in 2005 when I decided that I wanted to launch my first e-newsletter and I came to you for help, I would have to say that your humor was maybe not the number one factor—or maybe it was, I'm not sure—but it was a major factor for me because I

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love humor. It really set the stage for me believing, hopefully not too erroneously, that you were a pretty nice guy. And also you were very good at what you did in terms of your own marketing. So there were a few factors, but humor definitely loomed large.

Thinking in terms of likeability, maybe humor, but especially likeability in marketing, how important is it from your perspective for solo professional service providers to think about likeability in their marketing?

Michael Katz:

I think it's huge. I always use the term likeable expert, and I think both of those combine, particularly if you sell a professional service, and those are the people I work with. And the reason it's so important there is because when you're selling something that, at least from the outside looking in, looks identical to all your competition—attorneys, financial planners, consultants, coaches—I mean, everyone in those fields appears to be selling the same thing, and the truth is they really are, for the most part.

My ability to decide who I want to work with doesn't come down so much to how good you are because I can't actually tell, even after I hire you. I don't actually know how good my accountant is or my attorney because there's no way to compare. What I do know though is how much I like them. I don't think there's a universal standard of likeability. I may like my accountant and you may hate her. The key, I think, though is matching up with the people who like your personality and, maybe more importantly, like your point of view about how you do accounting or whatever you do.

And so what I found is that learning how to kind of drop this professional veneer, which is easier said than done, is a great marketing tool because it allows people to figure out, hey, I like him or her, or I hate them and then never call them and actually everybody is better off when that happens. So the likeability thing matters much more than I ever thought. I actually think on the likeable expert thing, it's like 60/40. I think likeability more important than just expertise. You need that too, but that alone isn't enough to stand out.

Stephen Lahey:

I've been thinking a lot lately about polarization—and what does likeability have to do with polarization? Well, I think it has everything to do with it. If you really put yourself out there in a

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certain way, like you said, some are going to really like you because you've given them something to like, something authentic, some aspect of you, and some are going to reject that aspect of you.

Michael Katz: Yes.

Stephen Lahey: Talk about polarization a little bit and how that figures into what you do.

Michael Katz: Well, I think it relates to everything from revealing your true personality, taking a position on things in your industry, even occupying a niche. It's the same issue. I'm always trying to get people that I work with to narrow their focus. The reason is because when you narrow your focus, you kind of move to the front of the line.

So if you're a financial planner, that's fine. But if you're a financial planner who only works with female small business owners in Arizona, that's a much smaller market, but, boy, you'd be right at the front of the line for people who fit that niche.

Now that's very scary for people because they feel like they're giving up potential clients, but what I find is they're actually getting rid of the competition because it's hard to compete with that person in that market.

So maybe there's a fear that I'm hurting my chances at getting a client. But I'm always saying, well, it's not a lottery. It's not how many tickets you're holding. It's how you stand out. Same thing with your personality. You need to let people see the real you so that they can decide what makes you different from all the other attorneys or real estate brokers or whatever. People don't like to do that because it feels somehow risky.

Stephen Lahey: When did you start using humor in your marketing as you started your own business and how has that actually developed over time?

Michael Katz: I started because I used to, when I first started my business, and the thing I did almost exclusively for my first ten years was email newsletters, because there was a writing element to it, I just naturally wrote business things, newsletters, in a kind of funny and also highly-personal way. I talked about my kids, my dog, my personal experiences. And I only did that because I used to write a

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humor-based column for the newspaper, and that's all it was, and so it was natural for me to do that and then introduce business concepts.

And what I discovered was that people really liked that. Mixing the two, the humor plus the useful information, was a way to get people's attention and made the whole thing kind of easier for them to understand. So it just was natural for me, and I even slowly got more comfortable being, again, more myself. I mean, I'm not like over-the-top crazy, laughing kind of stuff, but enough that when people read something I wrote, for myself, not for clients necessarily, it keeps them entertained. And I think that matters more and more because everybody's got a short attention span and all that kind of stuff, so it's kind of worked well in the 21st century world we're in.

Stephen Lahey: Somebody I was listening to, I think this was another podcast maybe a month ago, was talking about branding—and asking what is a brand? Basically it's what people think and feel about you. And humor, it's on the feelings side. There's something very primal about humor.

Michael Katz: Yeah.

Stephen Lahey: You know, why do we laugh? It's a good question. It might be fun to actually know because then we could let loose with some humor in our own marketing. Is that something you'd recommend, if we consider ourselves humorous people, or do you think this is a huge risk and we should really step back and think about it?

Michael Katz: I think what you just said, Steve, is the key, if you consider yourself a humorous person. Because I definitely have an advantage in that one of the things that comes natural to me helps in getting people's attention, but the real kind of message is you need to be yourself, so it only works for me because that's the way I am in real life. And I think that's a key here, too, that what I want is that if you go to my website or you read my newsletter or you hear an interview with me, and then you meet me, it's the same person.

So if you're not funny to begin with, like I have people sometimes who want to hire me to write something for them that's funny, and I always end up saying that's not going to help because when I finally

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meet you, I'm going to wonder where that guy is. And I don't think that humor itself is the universal thing you need. What you need is to come across in a way that's authentic so, again, you filter out the wrong people and the people who would like you come to you.

I would say, though, that for the people who humor is part of what they do and they can use it, it's very effective. You have to be careful about not being too over the top, but I find most people are way at the other end of the continuum. There so concerned, forget about humor, they're so concerned about using words that are sort of normal and every day because they somehow think they'll sound unprofessional that they're writing becomes this corporate blah, blah stuff that nobody wants to read. And I mean this is true of solos as much as it is bigger companies.

Stephen Lahey: And isn't that great for the rest of us though? It makes it so easy to stand out, doesn't it?

Michael Katz: As my grandmother would say, you can't be above average unless somebody else is below average. So yes, the low bar is everyone's friend.

Stephen Lahey: Well, I'm fixated on humor. So I'm going to ask you to give us an example of how you added a humorous element to one of your recent eNewsletter posts and sort of how that works for you as you're writing. I know you said it happens naturally, but just take us into your head and describe what happens when you're doing that.

Michael Katz: So for example, I tend to tell a lot of stories. And again, that's natural for me. I find that the approach of starting with a story that has nothing to do with business—and by the way, I do this when I speak to a group, too. I always begin with a story that absolutely nothing to do, it seems at the beginning, with the topic, but that grabs people. They want to know where you're going.

A particular example, which I tend to use a lot of, was I wrote about how the town I live in is where the Boston marathon begins, and so every year they clean up the town in an incredible way. And so I listed a bunch of for examples, like they paint all the lines, they touch up the statues, and they ask the unattractive people to stay inside. So it's like this sort of two real things and one joke at the end. It kind of works real well.

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Again, it's not like crazy laugh off your seat stuff, but it keeps people reading the words. It's hard to skim humor because you don't get a joke unless you read the whole way through. And so because I mix it right together with all the business stuff, people kind of have to read from start to finish or they'll miss the whole thing, and I've had people tell me that. So it's a very effective writing tool.

Stephen Lahey: When you're telling a story, whether it's humorous or not, I think all of us would be well-advised to think about what you just said. Telling us a story means engaging us at the attention and interest stage of the sales process.

Michael Katz: Yes.

Stephen Lahey: How do you get people's attention? How do you intrigue people up front in what you do?

Michael Katz: For starters, I cheat. And what I mean is I deliberately game the system in the sense that my work in marketing is all about marketing to the people you already know. And people you already know meaning from your brother-in-law on down to somebody you met yesterday and everybody in between.

So I don't do any writing that has to do with writing things for strangers who see an ad or something like that. That's not my area. My whole thing is writing to this population of people because most people, solos and bigger companies, don't do anything to stay in front of the people they already know.

And so the reason I say it's gaming the system is I don't need to stand out as much to get your attention, Steve, because you and I know each other. This whole idea about how do I grab the attention of someone who is just walking down the street, that's a lot harder than how do I just reconnect with somebody I already know.

But anyway, all that said, I find one thing is to sort of go right into it. Like when you watch a movie, it always opens kind of in the middle of a scene, like somebody's running or something is happening. Whereas I find many people write in a way they start to lead up to what they're going to say. And I try and get people to start with an opening sentence that might just say like yesterday my

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dog bit my son, or something's that like right in the middle, something that makes you want to continue. It's a little bit of a learned skill, but I think in particular in an online format where people are always just one delete key away from leaving, you kind of have to get right into it.

Stephen Lahey: Great piece of advice. Because it is so intriguing when you're at a movie to see how they open the movie. It really sets the whole tone. I find that interesting. And I know today with television, and it wasn't that way in the past when no one could—this just shows how old I am and you are, too, Michael—

Michael Katz: Yeah. Thank you?

Stephen Lahey: —when you couldn't point something and switch the channel or mute it, you had to get up. The intros to the shows were very long. I don't know if you remember this. And now, you're just opening up right into the scene. They want to grab you right away, and they can do that.

Michael Katz: Exactly. What they often do is at the end of one show, they start the next one before sticking a commercial in between like they used to do.

Stephen Lahey: Exactly.

Michael Katz: Yeah. I think it's the same reason. They don't want you to stop and think where else I should go.

Stephen Lahey: Let's talk about that. As you get into a brief eNewsletter, which is probably what, about 800 words, something like that roughly.

Michael Katz: Yeah. I'd say tops. Right.

Stephen Lahey: How do you know that you've said enough versus saying too much? I'm a detail-oriented person. Sometimes I like more details.

Michael Katz: Yeah.

Stephen Lahey: Maybe I can find that level of detail elsewhere on your website, for example. What role does the eNewsletter or the blog post play? Is it more of the teaser or is it more like oh yeah, good, I've got what I came for?

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Michael Katz: Well, my belief is that if you could say what you need to say in the way you need to say it in one word, that would be perfect. Less is better. The problem is most people need to write a certain amount in order to both provide something useful, which to me is the key to a newsletter or a blog post. It's not about being promotional, it's about give me an idea that I hadn't thought of or forgot about so when I'm done reading it, I can say oh yeah, okay, I just learned something. And also, at least in terms of these longer format things, enough personality and story and background that I get to know you as the person because if I just give you information, I may be checking the expert part of the likeable expert thing, but I'm not giving you anything about you.

And so I find for most people, it's hard to do that in less than 400 words, 500 words. It requires a little bit of stuff. And I think that in different situations, and I even do shorter format things myself, so I'm involved in social media as well, but if all I had was social media, I'd have trouble getting that personality piece across. And that's where it's not just ooh, this guy is entertaining. That's where trust comes from as well. People start to believe they know you.

And I find it's so funny that sometimes I'll have somebody call me who has been reading my newsletter for a year who knows my kids' names and the fact that I have an ice skating rink in my backyard in the winter and I've never even heard of them. But they trust me already because they feel like they know you. That's really valuable because so much of selling is trust and I find it's easier if they show up already trusting you. Then it just becomes a discussion of whether what I have fits and the price and all that, but there's none of this checking you out that you'd get in a cold situation.

Stephen Lahey: I totally agree, and it's really looking for someone who you can relate to and you think will be able to relate to you and who you can trust.

Michael Katz: And that takes time.

Stephen Lahey: Yes.

Michael Katz: Yeah. Like sometimes people say what can I say to someone to convince them to hire me? And I'm like I don't know, that's just

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like what can I say to someone to convince them to marry me if I'd never met them. Nothing.

Stephen Lahey: It depends on if you want to marry someone with really, really poor judgment in Vegas. [laughs]

Michael Katz: Well, it's the same thing. Like anyone who's willing after one sentence is suspect.

Stephen Lahey: Yeah, exactly. Unless you're in Vegas and have had an immense amount of alcohol or—

Michael Katz: That's right.

Stephen Lahey: —something that probably you and I would not be doing, but that does make great reality TV though.

Michael Katz: That's true.

Stephen Lahey: There you go. Well, thinking about the solo entrepreneurs that you work with, and I'm a solo entrepreneur and so are you, people listening to this podcast, probably about 90% of them are, a lot of times I think that we feel we're at a bit of a disadvantage sometimes because it's just us, but we also know that there are advantages. So help us out here. What are the advantages that you see, the leverageable advantages of being a solo entrepreneur?

Michael Katz: One is that maintaining brand consistency, being the same in all situations, on your website and the things you write, when I meet you, all that, is a million times easier than a company even that has ten people. You go to a company that has ten people and you stop like five people in the hallway and you ask them to describe our company or even what do we do, you're going to get five different answers. That's one of the hard things for people who run a company is the consistent voice and message because it tends to be all over the place.

When I worked at a big company, there were people who would jokingly refer to it as the brand police. Like you weren't allowed to say certain things or type certain things relative to the product. The logo had to be used in a certain way. There were notebooks filled with rules about how you could use the logo. And it made sense. If you've got 1000 people around the world, you need to monitor

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that. But it's a weakness of a big company. That's why they hire people like Tiger Woods or they make up fake characters like the Burger King. It's to put a human face on this monstrous company.

Solos don't have that problem. More consistent, and also there's this personal aspect to it. So I'm always saying to solos stop trying to look like a bigger company. I mean, my large company clients pay me to help them look like the solos, and the solos are trying to run in the other direction. I find that it really is this idea of can you come across in an authentic way. And there's also usually a very specific local aspect to it for many businesses. Many businesses only operate in a particular place.

So if you're in Milwaukee and you're a financial planner and you can write about the fact that you went to the Milwaukee State Fair over the weekend or whatever, you are going to make a better connection than a company that is national and can't do that because they've maybe never even been in Milwaukee and they certainly don't want to rewrite the thing 50 times for each location. So it's stuff like that. It's like what can you do that doesn't scale very well.

Another one, which sounds ridiculous but is great, is handwritten thank you notes. A big company can't do that. But you can do it, and I can do it, and it makes a big impact. So there's a lot of advantages, but we tend to dismiss them because we look at the big companies and we think they know everything. But having worked at a big company, I guarantee you they don't know more than you, and the fact that there's so many people in the room often ruins the genuineness of the communication.

Stephen Lahey: I think most of us who are solos—well, let's just put it this way, I think very few of us came straight out of college with no professional experience and became a solo entrepreneur.

Michael Katz: Yeah.

Stephen Lahey: In my experience, most solo entrepreneurs went through what I like to call the corporate conditioning regimen where you spend most of your career in corporate environments where actually it's a bit frowned upon to be an individual. You're supposed to tow the line, and that conditioning does take a toll. And you and I talked about this at one point, where you can go back into the corporate

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environment, even for a short period of time, and you start feeling the weight of that.

Michael Katz: Yes. Right.

Stephen Lahey: To come out from under that is no small thing. And to come out from under it publically in your marketing can be kind of scary. I don't know if you have anything to say about that.

Michael Katz: I completely agree. I mean, here you are, I have the same thing, you've worked in a big company for a long time, your professional identity is in many ways propped up by the company's brand. And so when you go off on your own, most people don't feel legitimate. They don't think they're experts. They're concerned they won't be taken seriously. And so what they do very naturally, I did the same thing, is you sort of copy what you did when you had a job, hoping that you somehow look for real. It usually takes most people a little while to sort of both realize that they have an advantage as a solo, but also just have the kind of personal courage to break away from the pack. And the thing is that's where all the traction and the clients are.

It's funny, when I work with someone—I work with solos and then sort of micro companies, say ten people or less. That's kind of my specialty. And a lot of times I'm working with them on defining their niche or what are they going to say about what they do. I always tell them after, you know, we'll have a long discussion and I'll always say okay, look, don't tell anybody about this for at least a week. Because what happens is they get excited, it makes sense to them, they go home and tell their friends, and everybody tries to push them back to the middle of the road. It sounds a little risky to just specialize in this area or to use this phrase. And so their well-meaning friends keep doing the same thing, making them seem more anonymous. They think they're protecting them from making fools of themselves, but that's never the issue. It's that they end up looking like every other whatever it is they do for an occupation.

So I tend to be pushing people all the time to, again, not be funny if you're not funny or not be this if you're not that way genuinely, but most people who work as solos, there's something that drives them to do what it is they're doing. Because there's an unlimited number of things to choose, so why did you choose this? When you can uncover that, that's where your stand out marketing lives. It's not

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saying the same stuff that every other financial planner or attorney says.

Stephen Lahey: I like what you've said there. And at the same time there's also a challenge that I've seen some people have, and I'm looking at it from the perspective of my business. You've been writing for a long time now, 12 years, about a lot of things, but to bring it down to one bottom line, email marketing. That's the biggest thing. Right?

Michael Katz: Yeah.

Stephen Lahey: How do you stay true to yourself and still stay focused on that one thing without driving yourself crazy because of the repetition of it?

Michael Katz: This is kind of a longer discussion, but I believe that people should occupy a niche and when someone says what do you do kind of stick true to that. Again, for ten years I did nothing but newsletters, and I used to love the phrase I do one thing and one thing only, email newsletters, and I had a newsletter on how to do newsletters. The thing is, if you went back and looked at the newsletters I published over ten years, no more than two-thirds of them were actually about newsletters. They were about other things, solo professional and pricing and all that. Nobody ever comes to you and says hey, you're not allowed to step out from behind the focus, although I find having the stated focus is very helpful.

But all that to say that I just write about the kind of work I do. And again, that's what I recommend other people do; and since you're in that field, you're naturally interested and learning every day and so it's easy to just keep, you know, if you're a carpenter, you've got a lifetime supply of information related to building houses and all kinds of stuff like that, so you never run out.

Unless you decide I hate being a carpenter, there's no reason you'll find it monotonous because every day there's new stuff and new developments and it's really more the challenge of can you tap into your point of view related to carpentry and what you think is really good and what you think is bad and can you just share that with people. Because what happens is they start reading your stuff because they want to learn about fixing their own house, but when the day comes that they have a problem that's too big for that, like they want to put an addition on their house, you are the natural

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trusted already expert and so that's when people call you. And that again is the perfect scenario. It's like word of mouth. It's just systematic and much broader than if you just sat around waiting for someone to send somebody to you.

So publishing, whether that's social media or newsletters or whatever, is a key piece to all this because you need to continually be out there sharing your point of view for people to remember you and then also feel like they know you for years.

Stephen Lahey: So well-said. I'm sure a lot of listeners would like to learn more about you and how you can help them. We're running out of time here, so why don't we just let them know where can they find you online first of all?

Michael Katz: The simplest place to find me is at my name, MichaelKatz.com.

Stephen Lahey: K-A-T-Z. MichaelKatz.com.

Michael Katz: Yes.

Stephen Lahey: There you go. And I've enjoyed your newsletter for years. I've enjoyed what you do. And I have to warn people, if you get his newsletter, I know he says maybe you won't laugh out loud, but you might anyway. So be careful because you might actually be entertained along with being educated.

Thanks a lot, Michael, for being on the call.

Michael Katz: Thanks, Steve. I enjoyed it. Appreciate it.

Stephen Lahey: And to our listeners, thank you for spending some time with us today. If you like what you heard, I encourage you to visit SmallBusinessTalent.com and subscribe to the podcast by email. And if you do, I'll alert you whenever we post podcast content and you'll also receive exclusives, including subscriber bonuses complete podcast transcripts, and more. Thanks again for listening today and best wishes for your success.

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