



CHICAGO SOCIAL PODCAST: EPISODE 01

THE GOLDEN ROLODEX IN THE AGE OF DIGITAL MARKETING WITH VICKIE AUSTIN

THE OFFICIAL TRANSCRIPT

Voiceover: Live from Chicago, the podcast that brings together the best minds in digital marketing today, Chicago Social. Now from the offices of Boxless Media in the heart of downtown Chicago, it's the deep-dish-eating, eternal Cubs fan, and man of the hour, our host, Jason Baumann. Now, let's get social.

Jason Baumann: What's up Chicago and beyond? I'm so excited to be here launching this new podcast. My name is Jason Baumann. I'm the chief digital strategist over at Boxless Media. We're located here in the heart of downtown Chicago right under those fantastic Wabash Street L trains making it very easy to broadcast. I want to welcome you to the inaugural episode of Chicago Social. This podcast is being produced weekly bringing you some of the biggest and brightest people in digital marketing. In fact, each week we're going to feature someone who's out there making a difference with some aspect of digital marketing. Whether it's social media, web design, digital advertising, or search engine marketing, we're working hard to insure that each week we bring you some valuable tips, insights, tricks, and even tools that will help you grow your business; but I want to hear from you, too, so make sure you send me a tweet at Boxless Media and include the hashtag #socialonair.

Enough about me, enough about this podcast. We have an amazing interview lined up for you today, so let's jump right into it. Today we have with us Vickie Austin, someone who I've always looked up to and highly respected, talking about a rather unconventional piece of technology, her Rolodex. Why would I start out a brand new digital marketing podcast with someone talking about a Rolodex? Because before we can talk about the world of social media, I think we should talk about networking, and I don't know anyone who knows more about networking than Vickie.

Vickie fell in love with strategic planning during her career in healthcare and marketing. Sitting in a board room in Scottsdale, Arizona, a few years back, Vickie was enthralled with the process of mapping the future through words. She took that simple model and applied it to her own career development, and then began helping others by creating strategic marketing plans for them. Then a business was born. In 1997 Vickie launched her company, CHOICES Worldwide, where she helps executives and entrepreneurs map their own business and career success through strategic planning, networking, and marketing. Vickie is an engaging speaker, a dynamic leader, and passionate businesswoman, and when there's free time, she's a singer, cellist, songwriter, and poet. I'm excited to introduce Vickie Austin, so Vickie, welcome to the podcast.

Vickie Austin: Thank you so much, Jason. Thank you for that generous introduction.

Jason Baumann: It's my pleasure. I'm excited to have you here on the podcast. I think it's really important that we talk about networking before we even get into this whole world of social media. I couldn't think of anyone better to ask than Vickie Austin. I want to first talk about why we're talking about a Rolodex. Before we can do that, what's a Rolodex, Vickie, because I have a feeling there's going to be a lot of listeners to this podcast who have no idea what a Rolodex is.

Vickie Austin: I think you're right, Jason. A Rolodex is a tool ... It's one of the old school business tools that we all saw in offices wherever we went. Oftentimes cylindrical, it was essentially a collection of names, contact information, addresses, phone numbers, and ways in which we could reach people. Sometimes it looked like a cylinder. Sometimes it kind of looked like a shoe box, and it's the way we would contact people. If we needed to look them up and talk to them, we would give them a buzz.

Jason Baumann: Perfect. What does this have to do with networking and social media and all that?

Vickie Austin: Well, I believe that people are connected already to the resources and the people that they need to know in order to achieve their ambitious goals, whatever those goals are. I came up with the term "The Golden Rolodex" years ago. When I began my coaching practice, I was amazed at how often people underestimated the power of the network that they already had or have now. One of the first questions that I ask a prospective client is, tell me a little bit about your network. They either say, "I don't have a network," which is patently untrue, or they underestimate the power of the network, and they hang their heads and say, "Well, my network's not really very good." I believe that's because people don't understand the power and the velocity that we can generate just by reaching out to the people we already know. It's almost like underestimating ... It's sort of like taking the people we know for granted and thinking, "Well, I don't really know anybody. I'm not connected to City Hall, or" ... Unlike you, Jason. You're connected to everybody. Not everybody has those connections.

Jason Baumann: I think that's a really interesting point because I think the first thing you want to do when you talk about social media is reach out to new people, but I think what you're saying here - and I think it is a really important point - is it's a way to really leverage the connections and the network that you already have. I think that's a very valuable and very applicable point to have in the social media world. Now, I understand that since you've come up with the golden Rolodex, you have rebranded that into something called "circles of gold," so it's basically the same concept. It's just maybe Google circles?

Vickie Austin: Actually, you could see it visually as a Google circle. Circles of gold is a phrase that essentially describes the many communities that you're part of. For instance, you and I are in a circle of gold based on people that we knew when we worked together at Crain Communications, right? That's a circle of people. You may have a circle of people in your family. You've got circles of gold in your work life. You've got circles of gold, the people that you either go to church or a synagogue or a mosque, wherever your house of faith is. Maybe it's a hobby. Maybe it's going to the gym together. All of those communities are circles of gold, and when we're on a mission, and I think everybody is on a mission, it makes sense to tell the people who are already in your circles of gold. Most people want to do business with people they know and people they trust, so that trusted circle is going to be your first-line marketing people who are going to be able to help you at least communicate about whatever it is you're up to. Then they, in turn, can introduce you to their circles of gold.

If you think of LinkedIn, that's really a wonderful, technical engine that is designed the same way. LinkedIn even says to accept invitations mostly and only from people, unless you're an open-platform person, but their recommendation is to accept invitations or to extend invitations to people you know. That's in their directive.

Jason Baumann: If someone comes up to you, it's their first career or they're beginning out in their normal life, and they say, "Well, I don't think I know these people. I don't think I have a lot of people in my network," what do you tell them?

Vickie Austin: Well, I usually gently ... I smile first of all, and say, "Au contraire, you know lots of people." For young people just starting out, especially kids, like college, young people who are either in college or just getting out of college, oftentimes it may be the people their parents know. Family friends are often a way to get some traction in whatever world we're looking for. Whenever somebody is interested in making any type of a career transition, as a career coach, I really invite them and encourage them to interview as many people as they know or as many people as they can find who already do that job.

For instance, I had a client who was interested in becoming a marriage and family therapist. I asked her had she ever met a marriage and family therapist. She had not. She wasn't married, so she'd never gone through marriage or family therapy, so to make a career choice without any data I think can sometimes cause a surprise. I introduced her to somebody that I knew, and he in turn introduced her to a whole world, through an association, of marriage and family therapy. She is now, I'm happy to say, a marriage and family therapist.

Jason Baumann: That's awesome, so does everyone need one of these circles of gold or golden Rolodexes?

Vickie Austin: I would say it a little bit differently, Jason. I would say everyone has one already. Even a monk in a monastery who's taken a vow of silence has a network, right? They may not be out and about at the business chamber of commerce, but they've got the brothers, the other monks, the people who are bringing food to the monastery. As human beings, we are connected, and the important thing is to first recognize those connections. Actually, I would take it a step further and say not just recognize them, but document them, so that you know ... It's not just this general idea of who I know. You literally have what would have been in the olden days a Rolodex, but now I would really call it ... Circles of gold is a lovely name for it, but we're essentially talking about building a database.

Here's the criteria. For someone to be in your circles of gold, they must know you by name or you know them by name, there's some connection there, and they're breathing, and that's it. When you think of it, all that they need is there's some connection there. It could even be someone like an alumni association. If you call somebody who went to the same school as you, and you introduce yourself with that connection, typically people will take your call or take your email. We look for connections. We look for patterns, and we look for people who've shared a common time, space, or experience.

Jason Baumann: I think that that makes a lot of sense, Vickie. I was just last week teaching a class at the City Colleges of Chicago, and we're talking about LinkedIn. I said, "You know, one of the things you need to do is you need to start building your professional network as soon as you get into college. If you go to a class and a guest speaker comes in, follow up with them afterwards. Have a meaningful conversation, and then invite them to connect on LinkedIn or connect on Twitter or Facebook, whatever platform you're most active on, but to really start building that network even before you graduate from college."

Vickie Austin: Absolutely. There's a wonderful book by Harvey Mackay who is one of the members of the National Speakers Association and a very prolific author. He's an envelope salesman who has taken his principles of sales and become famous as a speaker, and he wrote a book called Dig Your Well Before You're Thirsty, and that's really the concept is to be begin to build those relationships. You're not asking for anything necessarily. What you're doing is asking permission to build on a relationship. As somebody who does a lot of speaking, it's very flattering for someone to say, "May I

stay in touch?" and to followup with a LinkedIn invitation or even just a note. I always ask it that way. Do I have permission, may I have your permission, to stay in touch? Most people are going to say, "Absolutely." Really we know that it's a small world. Oftentimes we don't know what we need later on, and we don't know how we could be of service later on.

Jason Baumann: Let's see, five years or so that I've been teaching at these different colleges, I don't think I've ever told someone they could not stay in contact.

Vickie Austin: Of course not.

Jason Baumann: I absolutely agree. I think a lot of them, if they called me and they needed some help, I would be happy to go out and say, "Hey, you know what? You need someone in this industry? Let me connect you with someone that I know," in hopes that it would be a mutually beneficial relationship on both of their sides. Tell me, Vickie, how do you go about building your circles of gold or building up your circles?

Vickie Austin: I think the first step is to start with who you know. If you don't have a separate database ... Not everybody has to go out and purchase a CRM, a customer relationship management database. You can start in Excel, or you could even do it in a table in a Word document. A cautionary note is, if you have all of your contact information in your phone, to make sure you have a backup, or if it's in Outlook to make sure you have a backup to that. Especially people who are employed, they keep their contacts at work, and I encourage anyone who's employed by a company, if they're not self-employed, if they don't own their software, own their database, to have what I call a shadow office, which is an office at home so that if something happened, if for whatever reason, God forbid, you were separated from your company, within a day you'd have everything you need, whether it's contact information ... I'm not suggesting that people pilfer proprietary information from their company, but relationships ... You want to make sure that you could walk away from wherever you work and still maintain the relationships that you've worked so hard to develop. That would be the first step is build a database.

Jason Baumann: That's something you could do on LinkedIn, too, correct?

Vickie Austin: You can do it on LinkedIn, but again, LinkedIn owns that information, so I would encourage you to have something that is literally your own so that if LinkedIn changed or ... I just think it's important that it's your own, that you have it at your fingertips at anytime. Maybe LinkedIn does have that. I know that there's a section for notes, but the database that I have, I use a

program called ACT, which actually I learned about when we were at Modern Healthcare together, and it's served me very well over the years. I probably don't use the firepower that it has, all of it, but these are the things that I think is important to know.

All of the primary information, then I think you want to have a field for your source. How did you meet that person? Because I think you always want to go back ... You want to be able to go back to that initial connection. How did you meet them? Then I think you want to have a field for history. That would be if I sent you a card, I can put that in the history, and I know I sent you that card, and then a note section for anything that you may have shared with me that I want to be able to remember and then be able to reference later on.

Jason Baumann: That's amazing advice because I think sometimes we begin a relationship and I meet someone who I really feel might be a good relationship for myself and I could be of assistance to them, and it would be something that we should definitely continue on, and then I don't do anything about it, or I get so busy in everything else that's going in the office that something like that history column in that chart ... You could do it on Google Docs. You could do it on anything, just have that reminder of, okay, I have to check that spreadsheet. Every Friday afternoon I dedicate a half hour to go into that spreadsheet and seeing who I need to advance in the history column or tab or whichever.

Vickie Austin: Exactly, and that's another thing, that's another aspect of technology that is so great in a database like ACT. There's a tab for followup, and it will literally ... You can pick a date and so it'll pop up on your screen to say, "Call so-and-so three weeks later," and you don't have to think about it. You've already programmed it.

Jason Baumann: Got you, so what kind of tools do we need besides just some kind of either CRM software or Google Docs...

Vickie Austin: Yeah, or an address book.

Jason Baumann: Or a Rolodex.

Vickie Austin: Exactly. I say it doesn't matter if it's cocktail napkins, as long as you know where to find them and that they're in some alphabetical order you can find a friend again you need to find.

Jason Baumann: You know, I'm going to give all of the listeners a piece of advice. I've got about a thousand business cards scattered on my desk, some maybe on

the floor, and that is not a good system. I think if we could find a Google Doc template or some kind of even Excel spreadsheet or a piece of software like ACT or similar CRM. There's tons of CRM software packages on the market right now, it's definitely worth the investment instead of having business cards laying across your floor and on your desk.

Vickie Austin: It is. I went to graduate school at an international business graduate school, and we learned about the importance of business cards in the Asian culture. In Japan, when people exchange business cards it's really quite ceremonial. They exchange the card. They look at the card. They look at the person. They look at the card. They look at the person. They would no more stick it in their back pocket than they would, you know, throw a bucket of paint on that person. You want to honor the card as a representation of that person and as a representation of the relationship that you could begin with that person. We've all got stacks of cards somewhere. I always say if they're at the bottom of your briefcase or at the bottom of a lady's pocketbook, they're not doing us any good, so it really is important.

It's almost paradoxical, Jason, that something as important as our network boils down to actually gathering that data and putting it into some type of a database. I actually have a virtual assistant who helps me with that. When you think of it, if somebody's email is a Jason-dot-Baumann or Jason-underscore-Baumann, if those are wrong, I lose you, maybe not forever, but it's going to take me awhile to track that email back down, so paradoxically the data is very important. That level of detail, while it may seem sort of picayune or too clerical, too tedious, it's very important in terms of maintaining that relationship.

Jason Baumann: You mentioned the virtual assistant thing, and you what? That's a service that I just signed up for, I think back in December. I found a company online called FancyHands.com, and I'm ...

Vickie Austin: I love that.

Jason Baumann: ... What is this place? I'm going to tell you it has really made my life easier to have it. I pay, I think, 50 bucks a month, and it's completely worth it.

Vickie Austin: That's awesome.

Jason Baumann: I've used a lot of it for my upcoming conference, to find leads, and stuff like that, so mentioning that you have a virtual assistant service, that's actually a very good piece of advice, too. Vickie, you've talked about in the past having a great networking conversation, and I think that's

something, too, that is important, whether it's done online or if it's done in person at a networking event or at a breakfast meeting, you meet someone for coffee. Can you tell me a little bit about what the aspects of that great networking conversation is or how to do that, some advice?

Vickie Austin:

Sure. The first thing that I would think about is, how is it that I can best help this person? Networking, again, there are so many paradoxes that are in networking. Networking is not about selling yourself or your services or your product, at least not right away, especially in the services area. I work primarily with people in the professional services realm, accounting, financial services, legal services, and those are really high-end purchases, right? When you hire an attorney or you hire an accountant or a financial planner, you're hiring them at a highly billable rate perhaps and maybe even a relationship for life, so we make those decisions very carefully. When we meet we want to know that it's not just a transaction, so if you're preparing for ... Let's say that you met somebody at a conference or at a ... I like to use chamber events as examples because chambers of commerce are such great places to at least begin and then nurture business relationships.

You've met at a mixer or you've met at a conference. Now you have that person's business card, and the last thing you want to say, as I said earlier, is, "Would it be all right if I followed up with you? I'd love to stay in touch." Again, 99.9 percent of the time, people are going to say, "Sure, that would be lovely," unless they're moving to Mars or something inaccessible, an island where they don't want to be bothered. They give you permission, so then let's say the next week you follow up with them, you set up a coffee date, and then prior to that date, you want to confirm the date with them so that you make sure that you're at the right Starbucks, if that's where you're going because there is one on every corner.

I like to do something that I call three powerful intentions, so let's say, Jason, that you and I met at this event, and now I'm going to be meeting with you for coffee. On a post-it note I write three powerful intentions. Before I do that, by the way, I do my research. I go on LinkedIn or I google your name, and I look at if your bio's on your website or your bio's on your company's site. I look at your LinkedIn profile. I scroll all the way down to the bottom because it's important. I want to know where you went to school. I want to know what your interests are. A lot times people put that in their LinkedIn profile. I literally want to study you, not stalk you. Let me clear. It's not stalking but study you so that I learn a little bit about you, and I have ... In the news business they call it a hook. When we get together I might lead with something that references your alma mater

or references one of your hobbies or references a publication. Perhaps you were published somewhere, and I say, "I notice that you were published recently in this publication. Tell me about that." One of my powerful intentions that I write before we get together is to learn more about you. That would be number one.

Number two might be to share a little bit about what I'm up to, to share my mission, to plant the seed with you in terms of what it is that I do and how I might be of service either to you or the people that you know within your circles of gold. The third powerful intention might be to think of another opportunity to build the relationship going forward. I might lead with, "You know, Jason, I know that you're a Blackhawks fan. Let's get together. I'd love to take you to a hockey game," which by the way I don't know anything about hockey. I'm just pulling that example out, but I know that sports events, arts events, community events ... The name of the game is build the relationship. The key to it is to understand the person sitting across from you. It's not really about us.

People shy away from networking... I so appreciate your inviting me to be, first of all, your first podcast interview, and especially to share this mission that I have, which is to take the pain and suffering out of networking for people because I think so many people avoid it, and it's to their peril that they do that. It's because they think that they have to perform or they have to somehow be an extrovert. That could not be farther from the truth. Oftentimes introverts are the very best networkers because they know how to listen.

Jason Baumann: Gosh, Vickie, the last two minutes of what you just said, I wish I can just instill all of that into anyone who listens to this podcast because it's amazing advice. One thing I would say, Vickie, though is I did google you prior to this conversation, and I did come up with "Vickie Austin, urban terrorist," and I was wondering if you have any idea of what the Vickie Austin, urban terrorist, on Google is.

Vickie Austin: I do not. I am not related to her. This is a disclaimer. I am not related to her whatsoever.

Jason Baumann: Perhaps to following up with this conversation, I would like to do some research on that and get back to you. Would you give me your permission to reach out to you next week and let you know what that means?

Vickie Austin: Absolutely, and also, Jason, as you know, I've always turned to you for advice about technology. For many years you've been my go-to guy, so I

will want to ask you, how can I make that not happen anymore on Google?

Jason Baumann: We'll have to talk about it in an SEO conversation. Vickie, thank you so much for joining us. We've talked for a good time now, and I think you've given some really good value to the listeners. I appreciate you sharing that with us. Now, Vickie, I know you have a book out there. How can people reach out to you now, either to learn more about you, purchase your book, or get ahold of you in terms of coaching services?

Vickie Austin: Thank you for asking. That's very kind of you. I am just proofing the last galley of my book, *Circles of Gold, Honoring Your Network for Business and Career Success*. The best way to learn about it would be to email me, and I'll make sure that you get on a pre-order list for the book. I'm at vaustin@choicesworldwide.com, and you can always pick up the phone. I know it's so old-fashioned, but I still love to get phone calls from people. My phone number is 312-213-1795. I do also have a blog, VickieAustin.com.

Jason Baumann: Vickie, you do understand that this is a digital marketing podcast, correct? Is there at least a Twitter handle or something we could throw out there or no?

Vickie Austin: Sure, I am @Vickie_Austin, but you do have to spell my name correctly. It's V-i-c-k-i-e-underscore-Austin, and then I am on LinkedIn, and I love LinkedIn, so I do recommend for all of my clients and colleagues that they be active on LinkedIn, get a photo up there. That is the kiss of death not to have a photo. People want to know ... The whole reason for using LinkedIn is it gives you affinity with people so that you can elevate that relationship and get to know them. Fill out your profile fully. Put your hobbies and your interests because that allows people to reach out to you at a level that you can really connect as people. Be generous in your networking. Jason, I so thank you. You are one of the most generous networkers I know.

Jason Baumann: Well, I appreciate that, and I appreciate you being here. For those who are listening, we're going to put all of that information into our show notes, and you'll be able to access that online at ChicagoSocialCon.com/podcast. Once again, that's ChicagoSocialCon.com/podcast, and you'll be able to get all of Vickie's information, complete with links to her LinkedIn profile and her email address and Twitter account spelled correctly.

Thank you so much, Vickie. Also, for the listeners, Vickie had just talked about LinkedIn. We are so excited that we have Viveka von Rosen coming

up to join us on both our conference and our podcast in a few weeks, so stay tuned, come back, and thanks for joining us here on Chicago Social Con podcast.