

“PI” Should Also Mean “Professional Image”

By Paul Purcell

Face it. Our financial bottom line is affected by the fact we live in a world that judges a book by its cover. Pretty singers sell more records, stories of attractive missing persons rank higher in the news, and politicians are elected based on their image as much any other factor.

It's not right, but this issue of image is one that we have to live with and learn to work with.

Looking at the “image” of our own industry, don't we have to deal with the public's misperceptions? We see it on TV and in movies every day. More often than not, Private Investigators are portrayed as cheap, petty, low-rent, and usually alcoholic. Whenever I meet a new client for the first time, I usually hear, “Wow, you're not what I expected,” when they see that I'm in a suit and tie and conduct myself in a professional manner.

Besides potential clients, who else might be basing their opinion on the Hollywood stereotype? How about the legislators who are constantly chipping away at our rights to do our jobs? Or the database companies with poor cyber security who try to shift focus to us when hackers steal their data? How would they be able to get away with that if the world saw us for the true professionals the vast majority of us are?

Let's cut to the bottom line which is this: In today's business climate, all of us should realize that “PI” should also mean “Professional Image” and that all of us could stand to improve ours to some degree or other. It's what we need to do to keep our individual agencies alive, and to do collectively to keep our profession alive. Therefore, let's cover some opportunities for improvement using the acronym **A.L.I.V.E.**

Apppearance – Our physical persona and the way we present ourselves.

Letterhead – The level of professionalism demonstrated in our printed marketing materials.

Information – Accuracy and honesty; the keys to presenting the data we gather.

Voice – How we communicate to everyone we're associated with.

Education – The continual improvement to our professional knowledge base.

Appearance: People base a large percentage of their first impression on your appearance. When a client meets us for the first time, they're sizing up our credibility, our ability as investigators, and deciding how well we might conduct ourselves in public. As the saying goes, you only get one chance to make a good first impression, so let's look at a few pointers.

- The first thing you should do is dress the part. For men and women both, the attire should be “business professional,” which for men means suit and tie whenever possible, and for the ladies, business suits, nice skirt and blouse, or dresses. If you look unkempt or “second rate” the client will probably wonder how you will represent them while working their case.
- A close cousin to dress is personal grooming. Make sure your hair, facial hair, hands, nails, and teeth are all clean and well kept. By the way, how's your breath? Always keep some mints handy.
- Keep jewelry at a minimum. Jewelry should follow the rule on colognes or scents. It's best to smell of nothing than to overpower with the wrong thing. A general jewelry guideline is no more than 2 rings per hand, no more than 2 thin necklaces, and either post or small-ring earrings. And... you guessed it; visible exotic piercings are out if you're going to be taken seriously by the investigative and legal community. The “Professional Image Dress” website at <http://www.professionallimagedress.com> seems to have some good articles and checklists. Also, you'll find some good books and magazines on business and professional image at your local library.

Letterhead: In some cases, the first contact someone may have with you might be one of your business cards. For our purposes though, “letterhead” refers to any printed material (paper or electronic) anyone outside your office might see.

- Business cards are a must. Make them distinctive, but with minimal content. Let your website or brochure carry the heavy content.
- On business cards, stationery, and your website stay away from trite or cliché icons such as magnifying glasses, Sherlock Holmes pictures, or the use of “007” in your web address, phone number, or email address. These might be cute to colleagues, but to potential clients they're a turnoff.

- For stationery, choose a quality paper and have your letterhead and envelopes, as well as your contracts, professionally produced by the same people who do your business cards. Make sure their color themes match. Your local print shop or office supply store should have everything you need. If there's any one place you want to spend a little money, this is near the top of the list.
- Websites. If your stationery has a particular logo or color scheme, it should be reflected on your website, or vice versa. As with business cards, your website should be an exercise in minimalism after it's done its job of relaying all the necessary information about your agency. Avoid animation, sound files, heavy graphics, flash, or anything else that some web developers might think is "cool" but which actually makes your site slow to load. Slow loading or "busy looking" sites are more an annoyance than an attraction.
- Stay away from blank notepads and manila folders. They'll get too messy too soon and not only will that make you look unprofessional and disorganized, it will make you look unprepared. Also, lost or disorganized notes lead to inaccurate reports and invoices. Invest a little time and/or money into buying or developing a comprehensive set of forms or an organizer system to use in the field, especially in front of people involved in your case.

Information: In our business, the glass is neither half full nor half empty. It's at 50%. And, unless we know what's in it, we don't speculate. "Just the facts Ma'am." One of the biggest opportunities for a good impression, and naturally the most important, is the timely delivery of honest, accurate, information. Nothing will kill our image, our reputations, or our livelihood like an incomplete, inaccurate, biased, or late report. Likewise, an inaccurate invoice can cost us by being either too low or too high.

- Rule one is, always has been, and always will be, "Use a good case management system." Make sure everyone working for you uses the same system, and that your standards of accuracy start in the field, and proceed through not only the report and invoice, but through any follow-up you ever have with that client. Treat all of your other clients the same way.
- Use a nice looking presentation folder for all your reports; even the "small dollar" ones. Each client is important to you from a marketing standpoint and deserves to be treated with respect. Putting your report and invoices on better stationery, in a well-organized format, and in an attractive presentation folder will provide a greater perceived value to your client. These people have probably paid a hefty sum for your service and a professional report will help assure them it was money well spent.
- With any kind of information transfer, the key word in today's legal climate is "PRIVACY!" Reassure your clients in your contract, and in your final report that your relationship with them is as private as the law allows, and everything you do in connection with their case before, during, or after the fact, will remain confidential. Loose lips not only sink ships, they destroy good client relationships.

Voice: Voice is a general term used to describe not only the actual verbal communication you have with people, but the overall "tone" of your business.

- When you answer the phone, do so cheerfully and actually smile. You can tell when someone's not happy to be on the phone and so can others. This phone call might be your first contact with the next big client, so make it count.
- If you can't personally answer every call, the next best thing is to have a receptionist or answering service. A person is always better than voice mail. Go with what you can afford, but since the phone call is one of your opportunities for a first impression, anyone answering the phone should be trained to be courteous, cheerful, informative, and as professional as possible.
- If voice mail is your only option, make the best of it. First, be smiling and cheerful when you record the message. Second, have the message convey your high standards. Say something like "As we're extremely devoted to all our clients, we're probably out working a case on their behalf right now. However, YOU are just as important to us so please leave us your name and number and we'll get back to you within the hour." Then, if you say you'll be back to them within the hour, you should actually do it. Prompt personal attention is a major plus in any business.
- Education and intelligence are just as necessary as a cheerful hello. When speaking with people you want them to know that you are every bit as qualified and capable as they could hope for. Therefore, when speaking with people, speak clearly, and choose your words carefully. They don't have to be big words, but they do have to make sense, and grammar is important.
- The written word should follow the same rule. Make sure your business cards, letterhead, brochures, reports, invoices, and all other written documents use correct spelling and proper grammar. Though your client may be enamored enough with your abilities as an investigator to overlook a minor grammatical error, you never know who else of importance might see your report or correspondence.

Education: Here we continue where your writing skills leave off as we cover the actual knowledge or skill base upon which your investigative expertise is founded. Experience is the best teacher, but classroom education can certainly help keep you informed and up to date. Also, the fact that you are continually updating your training is impressive to most potential clients.

- Many states require continuing education for private investigators. If your state does, you should publish this fact in your agency's literature. If your state does not require CEU, you should still take it upon yourself to keep your own training updated and make that fact a prominent component of your marketing materials.
- Join professional organizations where possible. Many of them will offer various classes and training programs and, if nothing else, many of the functions will prove educational. At the bare minimum, if your state has a private investigation association you should join.
- Many online communication forums are professionally dedicated and will provide educational information and opportunities through either on-site or on-line courses, or through the hints, tips, and suggestions offered by members. One good online communication forum is found through "Yahoo Groups" at www.yahoogroups.com. The free registration is easy to complete, and all you'll need to do is search through the groups using the phrase "private investigator" or other keywords associated with your specialty.
- Keep your library stocked. Many people learn as much from books and videos as they do in a classroom setting.

As you attend some of these educational functions, take the opportunity to look around you and either further your own education on this issue of appearance by studying your colleagues, or help improve the way they represent you by helping educate them as to the benefits of a more professional image.

About the author: Paul Purcell is an Atlanta-based private investigator specializing in security analysis and preparedness consulting. In addition, he is the author of the only in-the-field case management system, "The Case File" found at www.thecasefile.com.