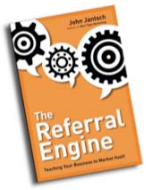
Referral Engine Pro Groups

Session #2 – Educating Referral Sources



A referral system!

- Be Referable
- Target
- Educate
- Offer and Execute
- Follow-up

The Marketing Hourglass℠

Know	•Articles •Ads •Referrals
Like	•Web site •Reception •Newsletter
Trust	•Marketing kit •Free report •Sales presentation
Try	•Webinar •Evaluation •Nurturing
Buy	•Service team •New customer kit •Finance/delivery
Repeat	•Post project survey •Cross selling •Quarterly events
Refer	•Results reviews •Partner intros •Peer2peer events

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Interview your clients

- Why did you choose us?
- Why do you stay with us?
- Why do you refer us?
- What do we do that's unique?
- What would you Google?

Compare your competition

- Web site test
- Core customer
- Core message of difference

Core Difference

- What do customers say it is?
- Can you communicate it?
- Are you missing opportunities?

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Referral triggers

- What do ideal customers say to themselves or others when you know they need what you do?

A listening station

Alerts
- Google Alerts
- Google Reader
- Search.twitter
- Boardtracker.com
- Backtype.com



Your partners network

- Who else could be motivated to refer business to you?
- Think next in line, think outside your industry
- Would you refer them?
- Resource library

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Locating partners

- By reputation
- Ask your customers
- Search engines/social sites
- Networking events

Partner network program

- Recruit and introduce
- Create content opp
- Acquire special
- Make referrals
- Rate and review
- Create events
- Meet as a group



Content for partners

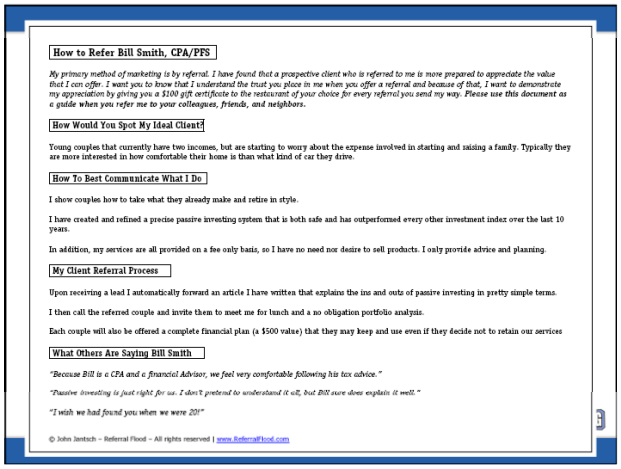
- Blog network
- Co-branded content
- Audio/video interviews
- Win-win events
- MeetUps/Biznik
- Local biz intros



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Educate – the perfect intro

- How you can spot our ideal client
- How to present our core message
- List of trigger statements
- Our referral offer
- Our marketing process



How to Refer Bill Smith, CPA/PFS

My primary method of marketing is by referral. I have found that a prospective client who is referred to me is more prepared to appreciate the value that I can offer. I want you to know that I understand the trust you place in me when you offer a referral and because of that, I want to demonstrate my appreciation by giving you a $100 gift certificate to the restaurant of your choice for every referral you send my way. Please use this document as a guide when you refer me to your colleagues, friends, and neighbors.

How Would You Spot My Ideal Client?

Young couples that currently have two incomes, but are starting to worry about the expense involved in starting and raising a family. Typically they are more interested in how comfortable their home is than what kind of car they drive.

How To Best Communicate What I Do

I show couples how to take what they already make and retire in style.

I have created and refined a precise passive investing system that is both safe and has outperformed every other investment index over the last 10 years.

In addition, my services are all provided on a fee only basis, so I have no need nor desire to sell products. I only provide advice and planning.

My Client Referral Process

Upon receiving a lead I automatically forward an article I have written that explains the ins and outs of passive investing in pretty simple terms.

I then call the referred couple and invite them to meet me for lunch and a no obligation portfolio analysis.

Each couple will also be offered a complete financial plan (a $500 value) that they may keep and use even if they decide not to retain our services

What Others Are Saying Bill Smith

"Because Bill is a CPA and a financial Advisor, we feel very comfortable following his tax advice."

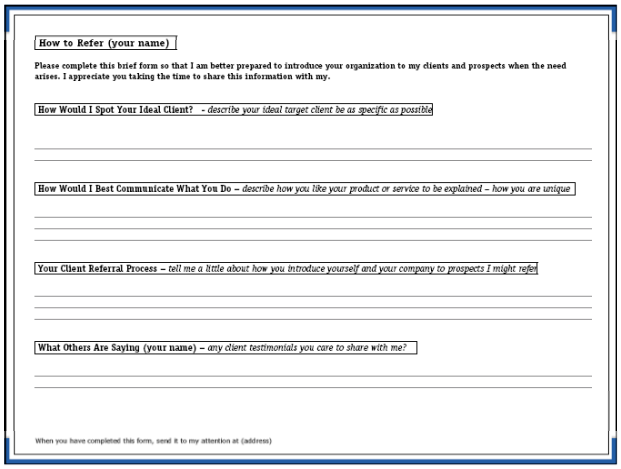
"Passive investing is just right for us. I don't pretend to understand it all, but Bill sure does explain it well."

"I wish we had found you when we were 20!"

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Intro in reverse

- Letter of introduction
- Perfect introduction
- Blank perfect introduction



How to Refer (your name)

Please complete this brief form so that I am better prepared to introduce your organization to my clients and prospects when the need arises. I appreciate you taking the time to share this information with my.

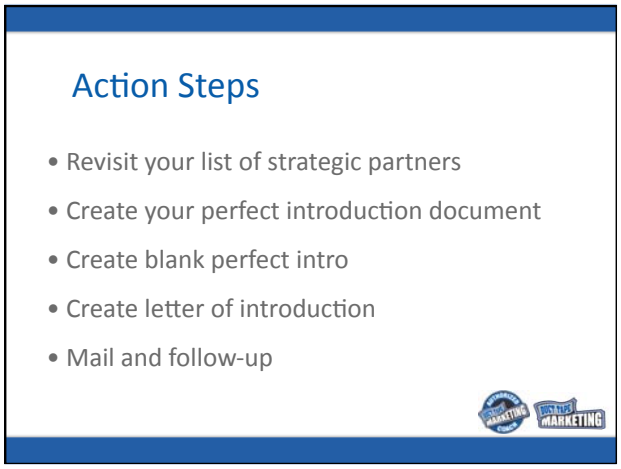
How Would I Spot Your Ideal Client? - *describe your ideal target client be as specific as possible*

How Would I Best Communicate What You Do – *describe how you like your product or service to be explained – how you are unique*

Your Client Referral Process – *tell me a little about how you introduce yourself and your company to prospects I might refer*

What Others Are Saying (your name) – *any client testimonials you care to share with me?*

When you have completed this form, send it to my attention at (address)



Action Steps

- Revisit your list of strategic partners
- Create your perfect introduction document
- Create blank perfect intro
- Create letter of introduction
- Mail and follow-up

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