# Referral Engine Pro

## Session Four Transcript

**John Jantsch**: Welcome to the final session of Referral Engine Pro. We're going to talk about launching your system, getting it out there, and then of course the follow-up component, the last of the system components. A little review from last session -- we asked you to revise your ideal target core message, always working on that. Complete the elements of your referral education system.

Talked a lot about testimonial success study plans. What is yours? Creating one customer referral offer, developing one strategic partner initiative. And then just outlining the tools that you might need. Letters, post cards, coupons, gift certificates, that sort of thing. Now, the customer referral offer and the strategic partner initiative, we've asked you to at least start outlining one.

However, this can certainly take on many, many forms. And I would actually suggest that over time you develop a multiple initiative so that you can reach people in different ways at different times, maybe different motivations. So to review the strategic partnering, we talked about producing all kinds of content that you could go out and co-brand or have your strategic partner network do an endorsed mailing.

That content certainly could include workshops where you would go out to maybe several strategic partners at one time and offer to bring them together, bring their clients together and present information. Present a workshop for them. And a lot of times they really see that as a very, very valuable initiative, because not only are they doing a value ad for their customers, they actually get to meet the other partner's customers as well.

So many times that will make them even more motivated to participate. There's another little angle to that some folks have done is they've built out their network of say 10 very solid strategic partners. And then have actually gone out and suggested to those 10, OK, you bring in 10 more. And all of a sudden this network of everybody working for each other in a very formalized systematic approach maybe grows to 100 partners.

With your customer base, some referral offers certainly just making it part of the sales process. The lead conversion process. Maybe going out to a customer that you do work with for and offering to do a certain project for them with the idea that if it's maybe a new product or new service. That if they think that it's very valuable, that they would actually recommend that maybe you'd do it for free with the understanding that they would go out and recommend that.

And you certainly want to disclose that information if they are recommending that you made them that offer, but they loved it and they're willing to talk about it. Partnering with non-profit agencies and running campaigns, where the agency might benefit from a specific promotion is a great way sometimes to get people pretty motivated, your customers motivated. The strategic partner, the non-profit motivated as well. Coming up

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with some sort of clever offer that may involve a financial reward, but wrapping it around something that we talked about last time.

The 100 percent refund approach, where people would actually be able to earn a refund by doing a certain activity. And then one of my favorites is because it's just so passive. You can do it all the time. Gift certificate giveaways. So just once a quarter or so mailing certificates of value out to your customers and allowing them or motivating them to pass those out as something tangible to put in somebody's hands.

Talked about your process involving something that I call moments of truth that you actually have as part of your process. It's one thing to have all of these other moving parts, the education, the expectation, maybe a campaign. But you've also got to have a place built into that process where you actually collect these referrals. So part of the lead conversion process, having a results review process or some way that you go and follow up.

Maybe it's just a routine follow-up meetings or through some form of quarterly communication. Then I throw in here's creating your own moments of truth is to go out and start just producing hand written notes. I got actually... I have received several. I have been a proponent of this idea for a long time and I often receive notes back from people that took this advice and said that they couldn't believe what this simple thing did for their business.

That people responded immediately. There may be some tools that you need to create. I would create a series of letters, post cards, if you're going to use the gift certificates. If you're trying to recruit strategic partners, maybe coming up with something that I've termed long ago lumpy mail, where you would mail them out a box or something that is more than just a letter.

That really explains your business and introduces your business, that maybe has something clever in it that really gets their attention. A lot of times that can make the difference in whether or not they open it even. You may consider creating some web pages that are not necessarily public, but that your strategic partners or even customers can use if they want to refer somebody.

You can actually have some reference to content on there that suggests, hey, you were sent here by XYZ customer. I can even see an instance where you might, for a strategic partner, build them their own co-branded page. So that if somebody wants, if they want to refer your business, their logo appears there. Or something that welcomes the person that they sent there, because I think it does a really great job of kind of solidifying your relationship.

But also there's that kind of additional trust mark. Hey, this person was committed enough that they would put their logo on there. This is not a casual referral. You might create a package that when somebody that you could actually give to strategic partners, give to partners. So that when one of the moments of truth happens for them, somebody utters a trigger phrase that they think, oh, I need to refer my strategic partner.

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Or I should tell them about your business. That they actually just have maybe it's a pocket folder with some content and they could just hand it. Maybe it's just simply a business card. But giving them something to refer tangibly. I want to reiterate, we talked about this way back in lesson number one. That some of the tools that you might want to consider, I think social media online tools have really become very, very valuable.

We talked about in lesson one creating your listening station. We talked about for your strategic partners to create content opportunities for them. Maybe as simple as creating your own blog network. Linkedin actually has really a searching feature that I think is very much like CRM and allows you really if you're looking for particular strategic partners.

If you're looking for customers or somebody that you met at an event that you'd like to connect with, they very much have the way for you to search through there and then actually save those profiles. There is a social network called Biznik, for example, that allows you to connect with people. It is very much driven by local events. So you might look into that.

A lot of the CRM systems now act as one. The 2010 version has it. Outlook, actually, in their 2010, it is reported that they are going to have functionality where you can actually take your records of prospects, or people that you have in those databases, and append them with Twitter data, and LinkedIn data, and Facebook data from your contacts, so that when you go to call them, or you're getting ready to send out an email to a customer or prospect, you've got that extra bit of information. Everything they've said recently in Facebook, or what they're doing in Twitter.

I believe, personally, that that can be a tremendous way for you to really deepen the engagement that you have with them, because it's publicly available information, but it, in many cases, can make you a lot smarter about what they care about.

So as I said, in LinkedIn, you would just find somebody that you were trying to target, or somebody that you met at a Chamber of Commerce event night. Again, I believe that connecting with those folks online is a great practice. You can find them, and then use something they call the "Profile Organizer" to save these profiles, so that maybe you want to go and follow up, and write a series of emails after you've done your searching.

This is a screenshot of Biznick. You can see that that particular shot is a Seattle event, but making and joining some of these connections, or these networks that are local based can be really a great tool, from a referral generation standpoint.

Here's just a quick screenshot of ACT 2010, that you can pull up a record, and you'll see, in this case, the LinkedIn information on that person comes right into the record. This screen has way too much information on it, but I'm going to share this idea that when it comes to networking, comes to using social media platforms, there are really some tremendous resources beyond Facebook. Some of them are very, very well known names, like The Wall Street Journal, for instance.

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All of these have their own social platforms, their own social networks. There are some great networking opportunities there. There are also just some great marketing opportunities, because they all allow you to build a page, your own page, that can link back to your site. So really, if nothing else, a nice way for you to actually get some more real estate out there on the web that links back to your site that you control.

So, I would suggest that you check out a few of these. This list of links will actually be in the course pages, as well, so you will be able to click on them.

We're going to move to the last bit of content that we want to cover, and that is the idea of follow up. You definitely need to have a follow up process. You should have a follow up with your customer, a follow up with the person that has referred to you, and then, obviously, a follow up with your referral sources.

I believe you need to ask yourself, you need to address this idea of what you do with referrals. So, when somebody gives you a referral, you receive a referral in some manner, that you actually have a specific, unique process for what you're going to do with that. Don't just throw them into the CRM system, or assign them to the next salesperson and say, "Go get this lead that came in."

A referred lead is a special lead. You need to treat it differently than somebody that maybe just read an ad, or read something about you and called you up. In many cases, there are a couple things going on with a referred lead that you need to address. In some cases, they are ready to buy, they went and asked somebody how they got this solution, and they referred you.

You need to be prepared to acknowledge that, acknowledge that they are special. Maybe even have some sort of special deal for anybody that's been referred to you. Actually, that can be a tremendous way for you to incentivize people to send referrals over.

But, you also need to understand that some cases, they actually won't be ready to buy. In some cases, they were just doing a little bit of shopping. Or, in some cases, somebody referred them to you because that person believed they needed your help, but they -- the person actually being referred -- may not actually realize that yet.

And so, you have to treat them differently. Be prepared to have a different sales cycle.

You do want to have a separate referral process for how you follow up with your leads that come to you from referral sources. That you go back, and you communicate with those referral sources. I believe that you can actually have several things in place. You can have a follow up that is purely communication, purely appreciation. Thanks for sending it. We do appreciate it. Acknowledge that you sent it.

Then, you can start exploring, dependent upon your business. Do you want to reward those referral resources with movie tickets, for example, if they're sending referrals to you? And then, another level if that referral turns into a customer. Maybe you want to show another level of appreciation.

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I think it's really important that you plan that, and at the very least that you -- particularly with strategic partners, but I think this is true with customers, as well -- that you actually have a way that you can go back to them and communicate, "Here's the result this person got." If you can set up a process like that, so that you are continuing to educate them, continuing to motivate them, I think you'll find that your strategic partners will be even stronger, because of the feedback that you are able to give them.

So, the other thing that I would tell you is, because this referral cycle, or the sales cycle for a referred lead... Plan some different follow-ups, too. Plan some automated drip follow-ups, so that you can continue to nurture those leads in your CRM system.

The last piece is that anytime you receive a referral, I suggest -- and this goes back to the very beginning, when we were talking about understanding your core difference, your core message -- get in the habit of, when a customer, in particular, refers you, get in the habit of picking up the phone. You can use it as a great excuse to thank them, which is something I think you should do, but also just ask them, at that moment, "What was the single most important reason you referred us?"

I think that that research that you do, and the answers that they give, actually might be more telling than pretty much anything else that you have at your disposal.

So, the last thing, we've come to the end of the actual lessons. You have had action steps each time. Your action steps, certainly for this week, will be to develop your follow up system, but also to really make a commitment to hold yourself accountable. At the very least, how is it that you're going to build expectation of referrals into your business?

Can you go to work on your business so that it is more referable? Can you design at least one client referral program and one strategic partner program?

That's the note that we're going to leave you with. Certainly look at this as a long-term process. You went through this in a number of sessions, but really building, and refining, and developing your entire referral system is really a never ending process.

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