



Preview / Introduction

NOTES

- **Program GOAL:**
After 12 Sessions, You Will Have Built a **SYSTEM** You Can Use To **Generate 15 (or, more) Preferrals** (Preferred Introductions) **a Month**

- **12 Sessions . . . 12 Weeks . . . Following This Overview / Introduction**
 - 1) **Profile**
Gaining CLARITY about who you want to meet
 - 2) **Sources and Partners**
Identifying WHO can introduce you to people you want to meet
 - 3) **Methods**
Generating Preferrals from Sources to people you want to meet
 - 4) **Plan**
Creating KPI's of daily / weekly activity required to achieve your goal

- **Weekly Coaching Sessions . . . with Bill Doerr**

During weeks 1 - 4, we will meet, for up to 45 minutes / week, to do the following:

 - a) **Answer** your questions about the subject addressed in the video and materials,
 - b) **Verify** you're comfortable with and understand the material, and
 - c) **Review** your assignments for the session,
 - d) **Preview / set goals** for what you'll be responsible for doing in the coming week

During weeks 5 – 12, we will meet, for up to 45 minutes / week, to do the following:

 - a) **Answer** any questions you have as a result of your weekly activities
 - b) **Compare** your Actual vs. Planned activity for the prior week
 - c) **Note** any discrepancies between what you did and what you got for it
 - d) **Identify** the underlying cause/s behind any noted discrepancies
 - e) **Identify** the best corrective actions to address your discrepancies
 - f) **Revise** your Weekly Activity Plan and KPI's for the following week to ensure your program goal . . . 15+ Preferrals / month . . . will happen in a timely manner (i.e. by the end of the 8th session in this program)
 - g) **Lather, rinse and . . . repeat**

- **100% You-Must-Be-Happy Satisfaction Guarantee**

After 4 Weeks . . . if you've done the work but want out . . . you're off the hook / all payments are refunded
After 12 Weeks . . . if you're not achieving your program's goal . . . you work with me, 1:1, until you do
After 26 Weeks . . . if you're not achieving your program's goal . . . ALL your fees will be cheerfully refunded*

* assuming you've done the work required and made a good faith effort to implement this program



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- **IMPORTANT CONDITIONS . . . To Satisfy . . . To Qualify . . . To Participate In This Program**

Conditional Application and Fee/s

- You must complete and return your answers to the questionnaire
- You must sign and return the 'Mutual Agreement' sheet -- page 4
- You must choose a payment plan to participate in this program
- You must meet with Bill Doerr to ensure this program is the right decision for you

- **The BIG PICTURE . . . of Developing Clients**

The 5 Key Functions

- 1) **FUELING** . . . generating the 'raw material' your business needs to run on
- 2) **QUALIFYING** . . . identifying who CAN and WILL do what you need to grow
- 3) **CULTIVATING** . . . building awareness, preference and confidence in people
- 4) **DECISION-MAKING** . . . helping people to make a decision to do business
- 5) **SERVICING** . . . building a relationship that builds a preference for you

Function #1: **FUELING**

- 1) The primary FOCUS of this program i.e. where we'll spend most of your time
- 2) The 4 Keys or 'Cornerstones' of Fueling
 - PROFILE** . . . a description of the kind of person you want to meet
 - SOURCE** . . . a description of the kind of person who makes that happen
 - METHOD** . . .
 - what you **SAY and DO** with Sources to generate Preferrals
 - what you **SAY and DO** to approach the Preferrals you receive
 - PLAN** . . . the daily and weekly activities that make your goal a reality

Function #2: **QUALIFYING**

- 1) Deciding if someone can help you in a 'meaningful' way:
 - a) Can they **BUY** the services, products or programs you're offering?
 - b) Can they **REFER** others to you or, you to others . . . who can?
- 2) If 'NO' . . . the ride is over! . . . don't waste time, money and effort on them
- 3) If 'YES' . . . they either become an 'active' prospect in your 'sales' pipeline, OR they enter into your 'Cultivation' process to ensure you'll build the know, like and trust you need to realize their Lifetime value / time



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Function #3: **CULTIVATING**

- 1) The function that helps you realize the lifetime value of a qualified person
- 2) The coordinated 'touches' that build awareness, preference and confidence
- 3) These are unique to each group of people you're cultivating:
 - Prospects . . . who have yet to buy or refer . . . and you believe they will
 - Clients . . . who have in the past and, most likely, will again in the future
 - Advocates . . . who may be 'raving fans' and can influence others to buy
 - Alliances . . . who can cross-promote with you by leveraging relationships
- 4) The Cultivation Campaign Plan . . . to reflect your choices for each group

Function #4: **DECISION MAKING**

- 1) Periodically, qualified people will develop a 'need-to-know' you can address with your product/s, program/s and/or service/s
- 2) As a result of being cultivated, when these times of need do arise, you should come to mind as a preferred provider of the solution to their problem or challenge
- 3) Helping someone make a decision is not the same as selling them something
 - Decision-making . . . weighing factors and choosing their best option
 - Selling . . . getting a prospect to buy whatever you want to sell
- 4) Decision-Making . . . implies options and choice and is 100% prospect-centric
- 5) Selling . . . implies options and little or no choice and is 100% seller-centric
- 6) Your role . . . is to help people make decisions about you and your services . . . even if the decision is that your services are not appropriate now or, for them

Function #5: **SERVICING**

- 1) Periodically Offering to Do 'whatever' you can to improve the life of someone
 - **Directly** . . . by something you do that they need . . . e.g. render a service
 - **Indirectly** . . . by introducing them to others who can . . . when you can't
- 2) Servicing creates the opportunities you can go to repeatedly over time:
 - to get the 'fuel' (Preferrals) you need to maintain and grow your business
 - to find opportunities to help people make decisions to secure your services
 - to demonstrate why you are a 'preferred' provider of your expertise / service
 - to deepen the bond of trust that gives you an unfair advantage or 'edge' over your competitors who are not serving these people as well as you are!



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NEXT STEPS

- 1) **Complete / Submit** your CONDITIONAL APPLICATION to Bill Doerr
- 2) **Verify** you have viewed the Video A: "Program Overview"
- 3) **Create** a list of any questions you'd like to address about this program
- 4) **Schedule** your decision-making meeting with Bill Doerr (if you haven't already!)
- 5) **Complete** the Assignment below and be ready to share with Bill when you meet:

ASSIGNMENTS #1 and #2:

GIVEN:

The video you've just viewed: "Program Overview"

YOU WILL:

Complete 3 ASSIGNMENTS (see below)

ON / BEFORE:

Meeting with Bill Doerr to make a Final decision about participating in this program

1) SOURCES . . . of Preferrals

Begin listing ANYONE and EVERYONE you know who fits this profile:

- 1) They are your RAVING FANS -- they know, like and trust you
- 2) They are likely to know the kind of people you'd like to have as clients
- 3) Their opinion is highly respected by people who know them
- 4) They are not only able but WILLING to help you . . . if you asked them

2) PARTNERS . . . of Preferrals

Begin listing ANYONE and EVERYONE you know who fits this profile:

- 5) They are in a business that serves a similar clientele to your own
- 6) They offer non-conflicting products, programs or services to your own
- 7) They have a 'fire-in-the-belly' . . . i.e. they still want to grow revenues

3) IDEAL CLIENT

List any factor you would use to identify someone who is an 'Ideal Client' for you



ASSIGNMENT 1: Sources & Partners

In this exercise, you are to list of as many people as you know who match any of these criteria:

SOURCES:

- 1) They are your **RAVING FANS** -- they know, like and trust you
- 2) They are likely to **know the kind of people you'd like to have as clients**
- 3) **Their opinion is highly respected** by people who know them
- 4) They are not only able but likely to be **WILLING to help you . . .** if you ask them

PARTNERS

- 5) They own a **business** or, are **self-employed** as a professional advisor
- 6) they are **servng a similar clientele to your own**
- 7) They **offer non-conflicting products, programs or services** to your own
- 8) They have a 'fire-in-the-belly' . . . i.e. they **want to grow their business and revenues**

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