



Session 1: Referral Profile

NOTES

- **Program GOAL:**

After 12 Sessions, You Will Have Built a **SYSTEM** You Can Use To **Generate 15 (or, more) Referrals** (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 Referrals from Sources to people you want to meet

- 4) **Plan**

Creating KPI's of daily / weekly activity required to achieve your goal

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

4 Weeks . . . if you've done the work but want out . . . you're off the hook / you pay nothing

12 Weeks . . . if you're not on track to meet your goal . . . you work with me, 1:1, until you do

- **This session focuses on: FUELING**

- This is a KEY function in generating the people you need to enjoy the income you want

- There are actually 5 functions that you'll use to build a profitable clientele:

FUELING . . . getting people to talk with about your services

QUALIFYING . . . identifying those people who are likely to BUY and REFER you

CULTIVATING . . . keeping-in-touch to build a preference for the brand called YOU

DECISION-MAKING . . . helping people to decide to use / not use your services

SERVICING . . . adding value to relationships over / above the services you offer

- These 5 functions form a holistic SYSTEM for:

- building relationships with prospects, clients, advocates and alliances

- generating clients, and

- growing revenues for your business or practice

- **INCOME . . . is the ultimate KPI**

- INCOME reflects 2 factors:

- **Competency** . . . that you bring to the table, and the

- **Opportunities** you get to convert your competence into compensation



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- OPPORTUNITIES . . . reflect two more factors:
 - **QUANTITY** . . . the number of people you get to talk with about your services, and
 - **QUALITY** . . . people who can best understand, value, desire and afford you
- MARKETING . . . ultimately, determines the nature of the OPPORTUNITIES you get to convert your competence into compensation?
- MARKETING, for an intangible service provider, means **REFERRALS** (or, Referrals!)
- **Think of your business or practice as a VEHICLE** . . . one that do wonderful things for you:
 - afford a nice home
 - create a decent retirement
 - fund a college education for your kids
 - create great memories from vacations
 - maybe even pull a big boat behind it throughout your lifetime, too
- **The problem is . . . if you don't put in ENOUGH of the RIGHT KIND of 'fuel'** (people) . . . it may not take you to all the places you want to see and the 'ride' may be a lot rougher than you like!
- **The best way to get 'Fuel' for your business or practice then is . . . REFERRALS**
 - most coaches, consultants and advisors agree that 'Referrals' is their 'best bet' to grow
 - unfortunately, most of them also agree they're NOT generating enough of them
 - They want them . . . they love them . . . but they often lack a SYSTEM to generate them
- **If you want to generate more referrals . . . you better have (and, use!) a good SYSTEM**
 - Get More Referrals, NOW! — is just the SYSTEM you've been seeking to do this
- **Get More Referrals, NOW! . . . is a SYSTEM for generating more opportunities**
 - Key Element #1: **PROFILE**
 - a description of the kind of person you really want / who makes a great client
 - Key Element #2: **SOURCES and PARTNERS**
 - the people you know . . . who know the kind of people you want as clients
 - the people who are willing to introduce you to them . . . if you but ask them to do so



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- Key Element #3: **METHOD/S**
 - what you must SAY and DO to:
 - help your Sources **identify** and **introduce** you to people they know, and
 - help you **contact**, **qualify** and **cultivate** the people your Sources and Partners are introducing you to meet
- Key Element #4: **PLAN**
 - the daily and weekly behaviors required to implement this GMPN System, and
 - generate a steady and predictable flow of new client opportunities . . . every month

Your Referral Profile

- **Why . . . do you need a 'profile'?**
 - to connect with people who can best understand, value, desire and afford your services
- **How . . . does your Referral Profile help you do this?**
 - it describes the kind of person you want to meet with extreme clarity!
 - It tells you if someone knows the kind of person you want to meet by referral / referral
- **Why are referrals so dangd problematic to ask for . . . and get . . . when you do?**
 - Reason #1: **People are Not Psychic**
 - if you solve problems . . . you are, by definition, a problem-solver, right?
 - admitting you have a problem . . . is difficult / embarrassing / awkward
 - people with embarrassing problems don't share them publicly very well
 - ergo . . . it's not easy to identify people who may have a problem / need your help
 - Reason #2: **People do NOT like to JUDGE other people as being 'broken' or 'not right'**
 - problem-solvers . . . need to connect with people who have problems
 - people with 'problems' . . . are not right . . . they're technically 'broken' in some way
 - even if you're 100% correct someone has a 'problem', making that judgment of them is going to put you on the 'hot seat' to defend your judgment if they question it
 - in the end, it's often easier to say, "Gee, I can't think of anyone right now"



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- **The BETTER Way . . . Don't ask for a referral . . . ask for an Introduction (i.e. a Referral)**
 - **REFERRALS**
 - imply knowledge of a need for the benefit you offer — but are they psychic?
 - burden the referrer with the responsibility of defending their judgment that someone they know is 'not right' or 'broken' in some way . . . not easy to do!
 - **INTRODUCTIONS / REFERRALS**
 - do NOT require knowledge of any need for the benefit/s your service provides
 - do NOT require someone to judge someone they know as 'broken' or 'not right'
 - do NOT burden someone to defend their judgment of someone as 'not right'
- **When you meet someone who MAY be able to refer or introduce you to others . . .**
 - Share a PROFILE of the kind of person you want to meet -- to see if they know someone
 - If so, ask them for an introduction to meet that person
 - That's it!

Building YOUR Referral Profile

- Your Referral Profile is made up of four (4) unique characteristics
- These define or describe the kind of person you want to meet
- These must be so clear that someone will immediately know if they know someone in their sphere-of-influence who can match one or more of the characteristics used in your profile

CVS . . . The Characteristics of Your Referral Profile

- **CVS is an acronym for what a good Referral Profile characteristic must be:**
 - C . . . it must be COMMON or, commonly found in your best or 'ideal' clients
 - V . . . it must be VISIBLE to the naked eye -- to eliminate the need to be psychic or guess if someone qualifies as having that characteristic
 - S . . . it must suggest SITUATION/s where your services are likely to be helpful / valued
- **An early client -- a financial advisor -- used these CVS Characteristics to grow his practice:**
 - 1) Owns a big boat -- 42' or bigger that is docked at a marina on Long Island Sound
 - 2) Has a nanny for their kids -- preferable a 'live-in' nanny
 - 3) their kids attend private schools
 - 4) their 'other' or 'second' car is a Lexus or BMW



Session 1: Preferral Profile

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ASSIGNMENT: Session 1

GIVEN:

- the factors you listed on ASSIGNMENT 2 after watching the INTRODUCTION video,
- what you've learned from Session 1 about CVS Characteristics and your Preferral Profile

YOU ARE TO DO THE FOLLOWING . . . BEFORE OUR NEXT COACHING CALL on ZOOM:

- 1) **LIST** . . . at least 10 Characteristics that you feel would help someone identify the kind of person who would be, potentially, an IDEAL CLIENT . . . for you
- 2) **REVIEW** . . . the characteristics you've listed in light of the CVS criteria we discussed
- 3) **REVISE** . . . the characteristics you've listed so they conform to the CVS criteria or standards that you learned about in this Session 1
- 4) **EMAIL** . . . your 'final' listing of CVS characteristics to me PRIOR to our next, scheduled coaching call
- 5) **MEET** . . . with me, as scheduled, to do the following:
 - Discuss
 - Defend
 - Finalizeyour Preferral Profile using the 'best 4' CVS characteristics we'll agree on together
- 6) **LOG-IN** . . . to your Expert Directory™ account and be sure your information in your profile there is accurate and to your liking
- 7) **LOG-IN** . . . to your Client Machine® account and be sure your information there is also accurate and to your liking
- 8) **CONTACT ME** . . . anytime you have a need to clarify something or get support:
 - EMAIL: "billd@sellmoremarketing.com"
 - PHONE: 860-798-6964
- 9) **CONTINUE** . . . to list possible SOURCES on Assignment 1 from the first Session



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 are in a business that is **servicing 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 **want to grow their business and revenues**

1. _____	21. _____
2. _____	22. _____
3. _____	23. _____
4. _____	24. _____
5. _____	25. _____
6. _____	26. _____
7. _____	27. _____
8. _____	28. _____
9. _____	29. _____
10. _____	30. _____
11. _____	31. _____
12. _____	32. _____
13. _____	33. _____
14. _____	34. _____
15. _____	35. _____
16. _____	36. _____
17. _____	37. _____
18. _____	38. _____
19. _____	39. _____
20. _____	40. _____



ASSIGNMENT2: **My Ideal Client**

For this exercise, you are to **list** as many characteristics as you can that would help someone know if they know the kind of person you want to work with as a client.

Think of your best clients . . . the ones you've enjoyed working with the most . . . the ones you'd be only too happy to 'clone' if you could. The ones who are not only profitable to work with, but you truly enjoy working with them. Got that image? Good!

In the space below, just write down any factor or characteristic that might help someone identify the kind of person who might be an 'Ideal' Client . . . for you:



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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 Referrals

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 Referrals

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