

# GET REFERRAL PARTNERS

*Workshop*

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Workbook

# Module 1 – The Foundation

First two fundamental steps:

- Live by The Platinum Rule – “Do unto others as they would want to be done for them.” (Dave Kerpen)
- The Engaged Appreciation Method– see sample note

Hello, [First Name]

I hope everything is going well for you. I just wanted to reach out and let you know how much I appreciate you and \_\_\_\_\_. You have really helped me to \_\_\_\_\_ and I thank you so much.

[Your First Name]

**Example 1:** Hello, Nancy! I hope everything is going well for you. I just wanted to reach out and let you know how much I appreciate you and your kindness. You have really helped me figure out how to relate to my rebellious daughter. It has been a blessing. Thank you so much!

**Example 2:** Hello, Barbara! I hope you are doing well. I wanted to let you know that I so appreciate you as my mentor. You are so supportive and encouraging when I'm feeling like I'm not going to succeed. It makes such a difference and I thank you for it.

# Module 1 Assignment

Social Platform	Contact Name

## *Module 2 – The Compatibility Advantage*

- Must have similar values, attributes and goals
- Offer to help them first
- Put your personality out there on display
- Ask THEM what THEY want first

## Module 2 Assignment

Values/Morals/Attributes  
Of A Great Referral  
Partner

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Contact Names of Great  
Referral Partners

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# Module 3 – The P.O.I. Rule

- The P.O.I. (Person of Influence)

What problem do I help my clients solve?

Blank response lines for the first question.

What else would enhance their life and help them solve their problem that is outside the arena of my expertise?

Blank response lines for the second question.

What products or services that compliment mine, do my potential customers purchase, read, consume or otherwise want before, during or after working with me?

Blank response lines for the third question.

## Module 3 Assignment

Types of  
Professions./Industries  
for P.O.I Relationships

People I Know Who Fall  
Into These  
Professions/Industries.

## Module 4 – The Interview Framework

- 1 to 2 parts
- First meeting 30-60 mins – take notes
- It's all about THEM
- Short follow-up planning meeting (when partnering is a good fit)

### The 3 C's

- Connect
- Communicate
- Collaborate

### Interview Questions:

- 1 If we were to speak again in three years, what would you have had to accomplish in your personal and professional life that you'd be thrilled to share with me?
- 2 What has kept you from accomplishing this already?
- 3 What would it be like if none of this was an issue?
- 4 What comments from your clients have you appreciated the most?
- 5 What would it be worth to you if this was all happening right now?



## Module 4 – The Interview Framework Continued...

### Name Your Interview

Examples:

- Discovery Interview
- Discovery Session
- Strategy Session
- Synergy Call
- Connection Call

### Invitation to the Call:

Hello, [First Name]

It was great meeting you the other day [on LinkedIn, etc.]. I enjoyed taking a look at your website. Great stuff! I'd like to invite you to a Connection Call so I can learn more about you and we can discuss how we might be able to help each other. If you're interested, let me know what your availability is within the next week.

Thanks! [Your First Name]

## Module 4 Assignment

Potential Partners or  
Collaborators To Reach  
Out To

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Date/Time Of Scheduled  
Call

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# Module 5 – Tying it All Together

## 5 Types of Referral Partners

- They refer people to you
- You refer people to them
- Both refer to each other
- Reciprocal Referral Team
- Affiliate Partners

## Collaboration Partners

- Strategic Alliance
- Joint Venture Partnerships (J.V.)

## Incentives

- Flat Fee
- Amazon Gift Card
- Contribution to the referral partner's favorite charity

## Module 5 – Tying it All Together Continued...

### Friends and Family Referral Program Announcement Email

Hi [First Name]

How are you?

[Personal reference... e.g. I loved seeing your dog on Facebook the other day! So cute!]

Anyway, I have some news to share with you. As you [may] know, I'm a [.....]. I'm taking a business growth course and have learned that my business relies on referrals. So, I've decided to create a 'Family & Friends' Referral Program.

Here's how it works. Any time you refer someone to me who has a problem with [.....], and they begin working with me, you will then receive a \$100 Amazon gift card from me. Every time!

I work with [your target market] who [what they struggle with].

You can check out my website to get a better idea of what I do:

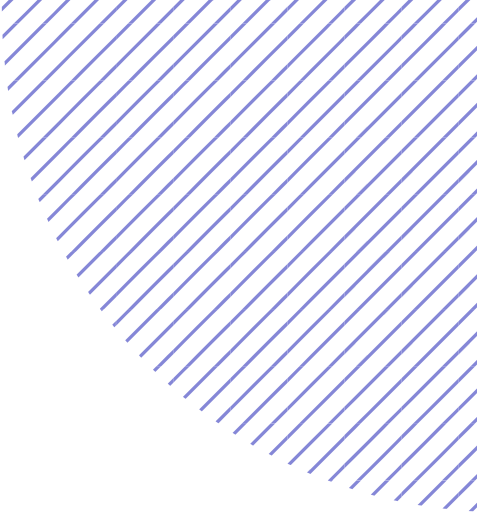
[www.yourwebsite.com]

So, if you can think of a few people you know who could benefit from my services, I'd appreciate you steering them in my direction!

[Closing remarks... e.g. I look forward to seeing you again soon. We have a new patio to show you too!]

Take care,

[Your First Name]



# Module 5 – Tying it All Together Continued...

## Referral-based Online Platforms

- LinkedIn – the Number 1 referral partner resource
- Facebook
- Refer.com
- Alignable.com
- Instagram

## Your Local Community

- Business Network International (B.N.I.) – [www.bni.com](http://www.bni.com)
- Meetup – [www.meetup.com](http://www.meetup.com)

What other possibilities are you aware of in your community?


# Module 5 Assignment

Your Vision For Your Partnering Relationship

What Do You Want To Accomplish?

Types of Relationships That Best Fit Your Vision

Partners To Establish In Next 90 Days