

CONNECT 365
REFERRAL ACCELERATOR



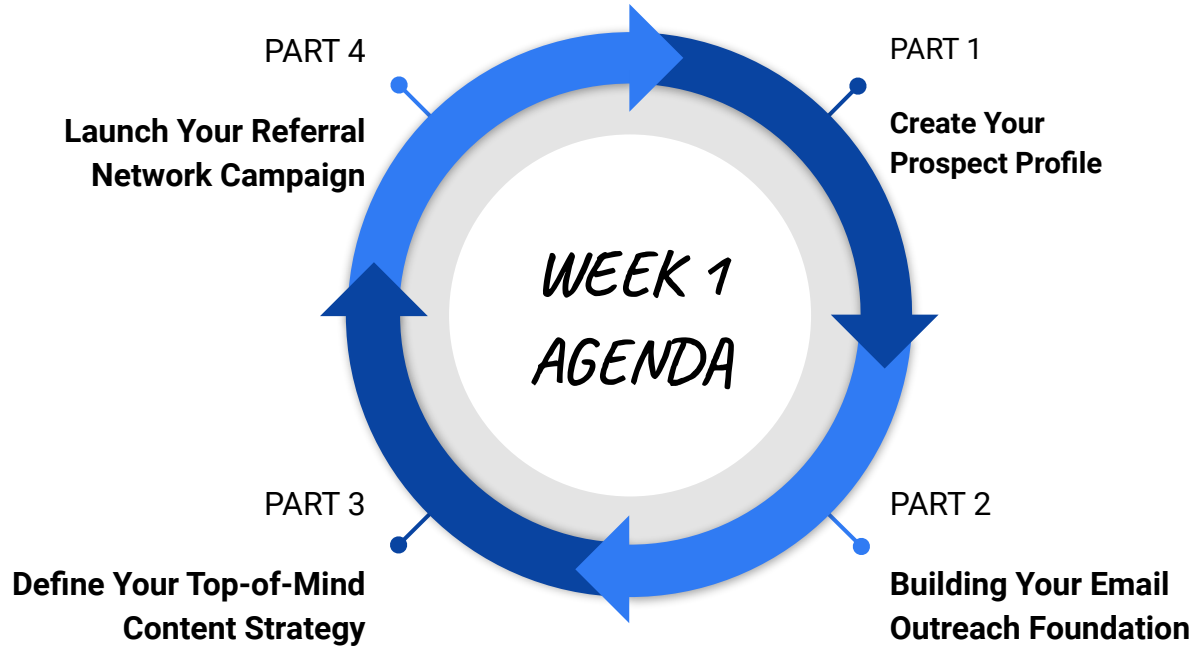
Take
the
lead.



REFERRAL ACCELERATOR

WEEK 1:

Finding Your Top Referral Partner Prospects and Building Your Own Center of Influence



Homework:

1. Link your email account (within Connect 365).
2. Complete Social Media Content Strategy (Emphatic).
3. Connect with your first 20 referral partner prospects.



REFERRAL ACCELERATOR

Important Info:

- Workbook** → connect365.io/workbook-1
- Training Site** → training.connect365.io
- Questions?** → support@connect365.io

Momentum.



Word-of-Mouth referrals	85% (6337)
Radio ads	2% (125)
Newspaper ads	1% (53)
Coupon clipper	0% (30)
Online ads (Google / FB)	9% (692)
Yellow pages	0% (26)
Direct mail	2% (178)



“85% of businesses list referrals as the best way to get customers.”

* Alignable

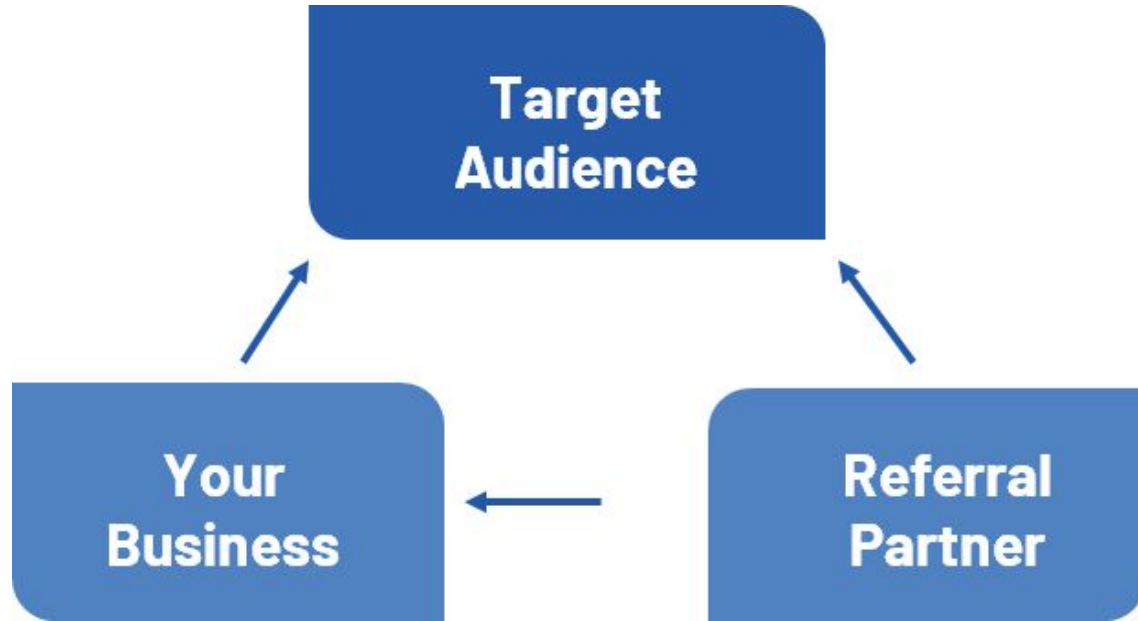
Yet...only 30% of businesses have a formalized referral plan.

~~REFERRAL~~
~~AMNESIA~~





Referral Partners





- ▶ CPAs
- ▶ Financial Advisers
- ▶ Other Consultants



- ▶ Personal Trainers
- ▶ Yoga Studio Owners
- ▶ Health Food Store Owners
- ▶ Chiropractors
- ▶ Acupuncturists
- ▶ Therapists
- ▶ Medical Doctors



- ▶ Consultants
- ▶ Complementary Marketing Agencies



Prospect Profile

Your Prospect Profile:

...is all about understanding exactly who your ideal prospect is. It's a cheat sheet that identifies exactly who your ideal target is.

I can work with anyone.

*I can work with anyone who needs what I
provide.*

What types of people (companies) have you worked with in the past?

Who made the buying decision?

What publications, blogs, influencers, etc. are they following?

What other types of vendors are they seeking out?

Job Title(s):

Job Function(s):

Location(s):

Industry:

Company Size (# of employees):

- 1-10
- 11-50
- 51-200
- 201-500
- 501-1000
- 1001-5000
- 5001-10000
- 100000+

Company Revenue:

- \$0-1M
- \$1-10M
- \$10-50M
- \$50-100M
- \$100-250M
- \$250-500M
- \$500-1B
- >\$1B

Think for a moment about WHY this target? What makes them an ideal referral partner for you? And what could THEY gain from the partnership as well? How might they stand to benefit. Add any observations below.

The image features a teal background with several light blue circles of varying sizes. In the center, there is a large, semi-transparent teal circle containing a white outline of an envelope. To the right of the envelope, there is a smaller, semi-transparent teal circle containing a white sun icon with rays. Overlapping the right side of the envelope circle is a solid dark blue circle containing the text "Link Email" in white. The text is centered within the dark blue circle.

Link Email

The screenshot shows the 'MAIL ACCOUNTS' section of the CONNECT 365 dashboard. The navigation bar at the top includes 'CONNECT 365', 'DASHBOARD', 'CAMPAIGNS', 'CONTACTS', 'TAGS', 'MAIL ACCOUNTS', and 'SETTINGS'. On the right side of the navigation bar, there are links for 'NEED HELP?' and 'RESOURCES', and a user profile icon.

The main content area displays a grid of account cards. The first row contains three cards: 'Pat Henseler' (purple circle), 'Josh Turner' (green circle), and a card with a grey person icon. The second row contains one card for 'Patrick Henseler' (with a photo) and a dashed box for 'Add New Account'. The 'Add New Account' box contains a plus sign and two buttons: 'Gmail' and 'Outlook'. Red arrows point to the 'MAIL ACCOUNTS' menu item and the 'Add New Account' plus sign.

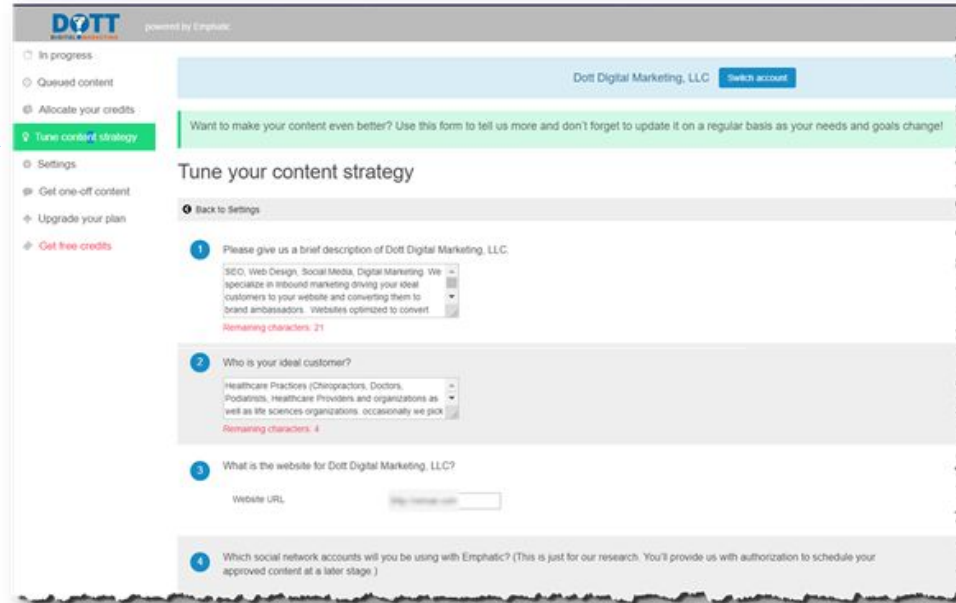
Account Name	Initials	Buttons
Pat Henseler	P	ALIASES, RECONNECT, DISCONNECT
Josh Turner	J	ALIASES, RECONNECT, DISCONNECT
[Grey Icon]	[Grey Icon]	SIGNATURE, RECONNECT, DISCONNECT
Patrick Henseler	[Photo]	ALIASES, RECONNECT, DISCONNECT
Add New Account	+	Gmail, Outlook

app.connect365.io/accounts



Content Strategy

Set Content Strategy



The screenshot shows the DOTT app interface. The left sidebar contains a list of menu items: 'In progress', 'Queued content', 'Allocate your credits', 'Tune content strategy' (highlighted in green with a blue arrow pointing to it), 'Settings', 'Get one-off content', 'Upgrade your plan', and 'Get free credits'. The main content area is titled 'Tune your content strategy' and contains a survey form with four steps:

- 1** Please give us a brief description of Dott Digital Marketing, LLC.
360, Web Design, Social Media, Digital Marketing. We specialize in inbound marketing driving your ideal customers to your website and converting them to brand ambassadors. Websites optimized to convert.
Remaining characters: 21
- 2** Who is your ideal customer?
Healthcare Practitioners (Chiropractors, Doctors, Podiatrists, Healthcare Providers and organizations as well as the sciences organizations, occasionally we pick
Remaining characters: 4
- 3** What is the website for Dott Digital Marketing, LLC?
Website URL
- 4** Which social network accounts will you be using with Emphatic? (This is just for our research. You'll provide us with authorization to schedule your approved content at a later stage.)

app.Emphatic.co/settings/survey/

Set Content Strategy

7

What topics should we talk about when we're not busy telling people how wonderful you are?

For example:

- On which topics would you like to demonstrate your expertise?
- Which topics do your customers consider in their purchase decision?
- Which other topics could they use some advice on?
- What are some major trends going on that they should know about?
- Which topics will motivate, educate, inspire them, or give them a good laugh?

We'll enter these topics into our web and news searches, so please speak to us as you would to Google.

<input type="text" value="Review Management"/>	<input type="text" value="20"/>	%	<input type="button" value="x"/>
<input type="text" value="Social Media"/>	<input type="text" value="20"/>	%	<input type="button" value="x"/>
<input type="text" value="SEO"/>	<input type="text" value="20"/>	%	<input type="button" value="x"/>
<input type="text" value="Local SEO"/>	<input type="text" value="20"/>	%	<input type="button" value="x"/>
<input type="text" value="Inbound Marketing"/>	<input type="text" value="20"/>	%	<input type="button" value="x"/>
<input type="button" value="Add topic"/> <input type="button" value="Hide Advanced"/>			

If you've chosen some percentage of 'Other topics' in question 5, you can use this to give us more detail on how much each topic should be represented. The proportions will be approximate and depend on batch size and content availability.

app.Emphatic.co/settings/survey/

Consistency

keeps you top of mind

+

Relevancy

shows that you understand their industry
and situation

+

Authority

highlights that you are THE go-to option in
your market

Tell us about your business.

Tell us about your ideal customers.

The LinkedIn logo is displayed in a light green color, consisting of the word "Linked" in a sans-serif font followed by the word "in" inside a rounded square icon. The background is a solid green color with faint, repeating silhouettes of people and various sized circles in shades of green and blue.

LinkedIn

The text "Connect with Your First 20 Referral Prospects" is written in white, bold, sans-serif font. It is centered within a large, semi-transparent blue circle that overlaps the background elements.

Connect with Your First 20
Referral Prospects

Years in current position

- Less than 1 year
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- More than 10 years

Company headcount

- Self-employed (22)
- 1-10 (168)
- 11-50 (289)
- 51-200 (451)
- 201-500 (440)
- 501-1000 (364)
- 1001-5000 (1,004)
- 5001-10,000 (477)

Industry

Financial Services ✕

Add industries

Banking (7.5K+)

Insurance (6K+)

Information Technology and Services (9...

Computer Software (38K+)

Internet (93K+)

Accounting (3.5K+)

Marketing and Advertising (300K+)

Investment Banking (587)

Years in current position

- 1 to 2 years** ✕
- 3 to 5 years** ✕
- 6 to 10 years** ✕
- More than 10 years** ✕

Less than 1 year (20)

Company headcount

- 1-10** ✕
- 11-50** ✕
- 201-500** ✕

Self-employed (6)

51-200 (118)

501-1000 (94)

1001-5000 (250)

5001-10,000 (154)

10,000+ (864)

2M+
Total results



76K+
Changed jobs in past 90
days


322
Mentioned in the news
in past 30 days


520K+
Posted on LinkedIn in
past 30 days


12
Share exp

Select all Save to list Tag

 **David Wagstaff** 2nd 
Founder: Helping business owners scale profitably. Advisor & done-for-you financial management at **Clarity FI, LLC**
12 years 3 months in role and company
Westburg, Michigan, United States

Past role
Director of Operations & Director of Business Consulting Services at **Capaldi Reynolds & Pelosi, P.A.** (2013–2016)
[Show more](#) 

 3 shared connections



 **Bret Stewart** 2nd 
Financial Advisor at **Merrill Lynch Wealth Management**
3 years 10 months in role and company
Los Angeles Metropolitan Area

 1 shared connection



 **Tanmay Kar** 2nd 
Chief Financial Officer at **Airbase**
1 year 10 months in role and company
San Francisco, California, United States

Past role
Interim Chief Financial Officer at **Leanplum** (2018–2019)
[Show more](#) 

 4 shared connections





David Wagstaff ^{2nd}

Founder 85,000 member Entrepreneur's Network. July 24th. New website, brand, and services for entrepreneur success.

Crushing it. A compassionate social impact entrepreneur with a passion for helping business owners scale and grow profitability while making the world a healthier, kinder, sustainab...[see more](#)

Vestaburg, Michigan, United States 500+ connections 3 shared connections

Current

Founder at Entrepreneur's Network --> eprez.com • 14 yrs 8 mos

Founder: Helping business owners scale profitably. Advisor & done-for-you financial management at Clarity FI, LLC • 12 yrs 3 mos

Previous

Founder at Alfrea Wellness • 4 yrs 4 mos

Board Of Directors at American Community Gardening Association • 7 mos
[+ 7 more](#)

Education

University of Maryland - Robert H. Smith School of Business • 1988–1990
[+ 5 more](#)

[+ Add tag](#)

Save

Message



Reports to:



Add manager

David's contact info

<http://www.clarityfi.com>

[clarityfi](#)

Show all (4)

Activity

Add note

Send invitation



David Wagstaff · 2nd

Include a personal message (optional):

Hi David,

I'm reaching out because I'm building a referral network of other business owners in the St. Louis area, and I'd love to include you if you're interested in getting referrals.

Josh
|

Save as lead

Cancel

Send Invitation

BONUS: Add Contact Details to Prospect Sheet

This allows you to save time in your upload.

Target: First 20 Prospects to add to your email follow-up and social media top-of-mind campaign

Download the workbook at:
connect365.io/workbook-1



Agency

TheFranchiseConsultingAgency.com
There's A Franchise For That.com



A Subsidiary of

There's A
Franchise
For That.

Message

View in Sales Naviga

M. Paul · 1st

I Can Help You Fire Your Boss And Start Your Own Successful Business Through Franchising. Are You Interested?

Baltimore, Maryland Area · 500+ connections · [Contact info](#)



M. Paul Speert, CFC, CPC



Contact Info

M. Paul's Profile

[linkedin.com/in/paulspeert/](https://www.linkedin.com/in/paulspeert/)

Websites

SASpromotions.com (SAS Promotions & Branding)

StretchableCovers.com (Custom Stretchable Covers)

TheFranchiseConsultingAgency.com (Company Website)

Phone

410-844-2774 (Work)

Email

paul@thefranchiseconsultingagency.com

Twitter

[sasproms](https://twitter.com/sasproms)

Connected

October 19, 2019

Prospecting Rules of Engagement

1. Remind yourself of referral prospect's value with the right approach.
2. Set a weekly goal or challenge.
3. Move quickly.
 - a. Filter as best you can to Prospect Profile.
 - b. Vet further throughout process.
4. Make time.
5. Celebrate progress.

The Progress Principle

Prospect -> Lead -> Partner

“Capturing small wins on *MEANINGFUL PROJECTS* every day enhances motivation and results.”

- Harvard Business Review



*“Don’t watch the clock; do what it
does. Keep going.”*

~ Sam Levenson

On the next:



Week 2:

How to Launch Your Relationship Building and Top-of-Mind Campaign

Homework:

1. Link your email account (within Connect 365).
2. Complete Social Media Content Strategy (Emphatic).
3. Connect with your first 20 referral partner prospects.

Download the workbook at:
connect365.io/workbook-1