

**CONNECT** 365  
REFERRAL ACCELERATOR



Take  
the  
lead.



REFERRAL ACCELERATOR

WEEK 2:

## Launch Your Relationship Building and Top-of-Mind Campaign

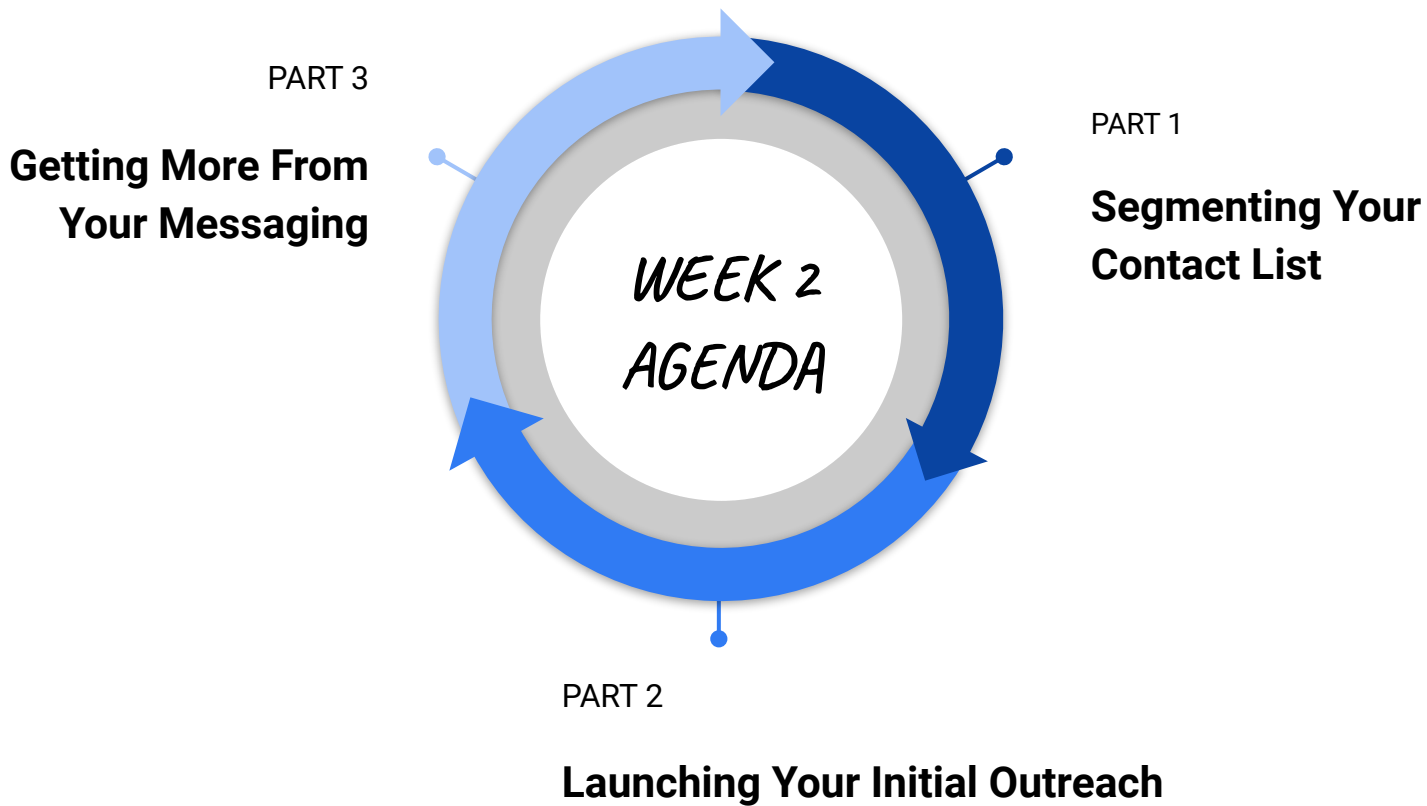
*Previously on...*

## 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.

*Review at:*

[training.Connect365.io/mrn-1](https://training.Connect365.io/mrn-1)



## Homework:

1. Send Message 1 to First Contacts (Connect 365).
2. Review Your Social Media Content (Emphatic).

*Download the workbook at:*  
[Connect365.io/workbook-2](https://connect365.io/workbook-2)



REFERRAL ACCELERATOR

## Important Info:

- Workbook** → [connect365.io/workbook-2](https://connect365.io/workbook-2)
- Training** → [training.connect365.io](https://training.connect365.io)
- Questions?** → [support@connect365.io](mailto: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.*



Organize with Tags

Quark

conEdison



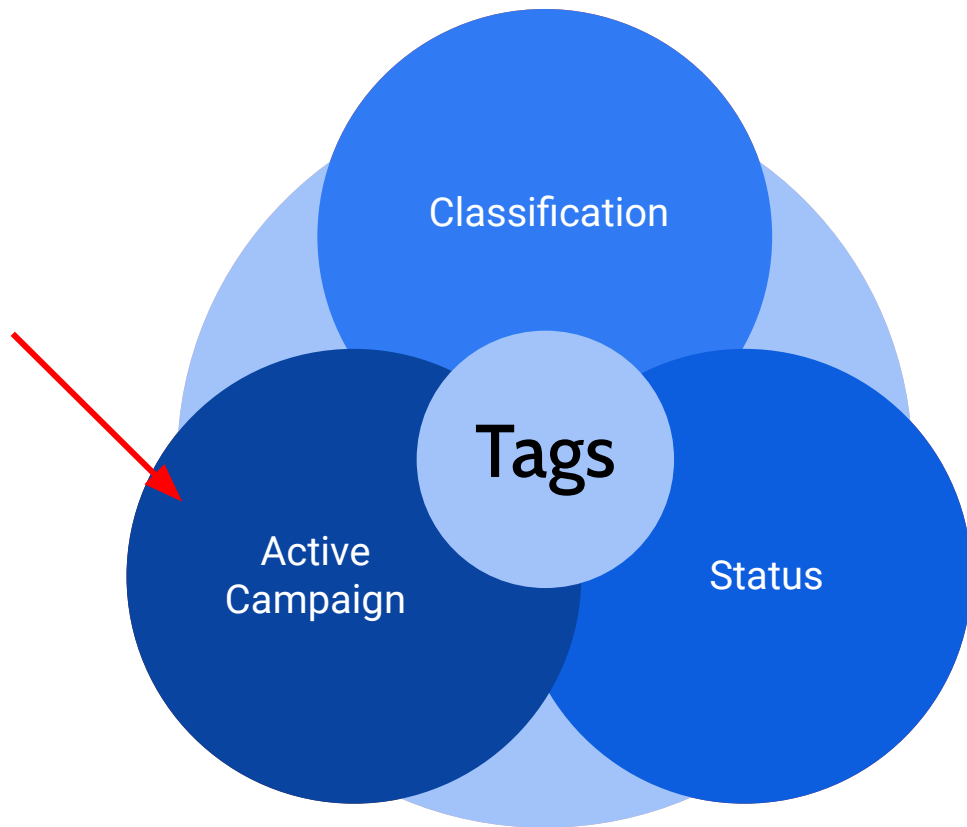


# Classification

- Customer Type
- Prospect Type
  - Industry (Mortgage Broker, Lawyer, Fin. Advisor)
  - Location
  - Interests (Opted in for X Webinar, Downloaded Y Case Study)

# Status

- Completed X Campaign
- Sent Proposal (No Response)
- Unengaged
- Exclude from Follow-Up



# Active Campaign

- Controls Who Is Currently in Campaigns (or Been Through)
  - Advanced Actions (more to come)
- These are the tags you apply when creating these campaigns.
  - Will add all contacts with this tag into the sequence.
  - If a contact has this tag removed, it will remove them from the follow-up.

The image features a teal background with a hand at the bottom right holding a blue circle. Inside the circle, the text "Upload Contacts" is written in white. The background is filled with numerous white envelopes flying from left to right, suggesting a large volume of data or communication. There are also several light blue circles of varying sizes scattered across the background.

Upload Contacts

ALL (12288) | IMPORT CONTACTS

Search Contact

EMAIL ID

Import Contacts

Export

Create Contact

ALL

DO NOT MESSAGE

Total Contacts: 12095

Show  Records

NAME TITLE EMAIL ADDRESS TAGS

DATE 1 ACTIONS



UPLOAD FILE



SELECT FIELDS



PREVIEW



ASSIGN TAGS



COMPLETE

## Import your contacts here!

Start importing your contacts by selecting the file type (.csv) exported from your LinkedIn and/or other accounts. You can also import your contacts from the Google account already linked to the application.

How would you like to import your contacts?

CSV File  Google Account

Choose a local CSV file to import your contacts from

Select CSV type

PICK CSV FILE



UPLOAD FILE



SELECT FIELDS



PREVIEW



ASSIGN TAGS



COMPLETE

Select the columns from your CSV file corresponding to the fields listed on the left.

Check mark if your CSV file contains column titles

	Column Titles	Preview
First Name	First Name	Gabriel
Last Name	Last Name	N
Email	E-mail Address	.edu
Company	Company	INC
Position	Job Title	Board Member
Group Name	None	-
LinkedIn Profile	None	-
City	None	-

Would you like to manage your extra fields for CSV import?

PREVIOUS

NEXT



UPLOAD FILE



SELECT FIELDS



PREVIEW



ASSIGN TAGS



COMPLETE

Here's the preview of your CSV file with **302/307** contacts ready to be imported.

NAME	EMAIL	COMPANY	POSITION
Carol Roberts	CRoberts@connect365.com	CONNECT365	Board Member
Willya Roberts	WRoberts@connect365.com	CONNECT365	Executive Director
Steve Johnson	SJohnson@connect365.com	Connect365 Commercial	Non-Executive Agricultural Properties
John White	JWhite@connect365.com	CONNECT365 Inc.	Chief Executive Officer
Paul Smith	PSmith@connect365.com	CONNECT365 Inc.	CEO



UPLOAD FILE



SELECT FIELDS



PREVIEW



ASSIGN TAGS



COMPLETE

Would you like to assign tags to your contacts?

Assigning tags to contacts groups them and makes it easy to schedule campaigns for a specific group.

[+ SELECT TAGS](#)

[PREVIOUS](#)

[NEXT](#)

COMPOSE

Inbox (6,763)



Important

Inbox (6,763)

Create Campaign

# Sequential Campaigns

1. Repeatable
2. Time Saver
3. Consistent

# Scheduled Campaigns

1. Tighter control over Delivery and Batches
2. Timely

# First Message

A referral for you?



**[REDACTED]** [\[REDACTED\]](#)  
to Paul =

Hi Bobby - Thanks for accepting my invite.

As I mentioned, I'm creating a referral network in the X market. I've been blown away by the quality of people who are in so far.

We're going to have a lot of great leads to send each other's way. Anyways, there's no cost or anything.

I am just doing this for my own marketing and would love to include you if you're open to it.

Is there a time we can connect next week, just to introduce myself and learn more about your business, and what types of clients are good for you?

Josh

# Call Agenda

- Thank them for taking the call.
- A quick recap of the referral network concept.
- Ask them to tell you about their business.
- Tell them about how you're looking forward to connecting them with some of the other people in the network.
- Ask them what kind of referrals are best for them?
- Tell them a little about your business, and the kinds of referrals are best for you.



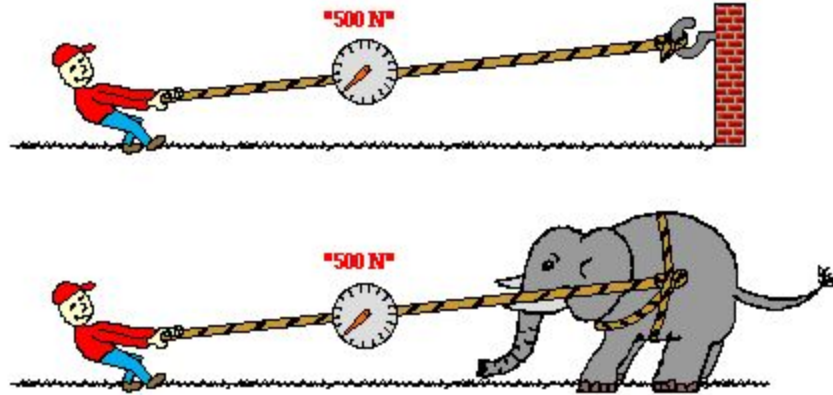
*And finally...*

*Are you open to staying in touch over email?*

# Advanced Actions?...

*Based on a trigger (engagement with your email), you can configure an action within the software.*

For every action there is an equal and opposite reaction...



# Triggers

- When Email Is Sent
- Opened Email
- Replied to Email
- Clicked Link in Email

*Then...choose the message you want to apply  
this to...*

# Actions

- Remove Tag
- Add Tag
- Mark as Do Not Message

# First Message

A referral for you?



**[REDACTED]** [\[REDACTED\]](#)  
to Paul =

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*If you leave it at that...*

You'll leave a lot on the table.

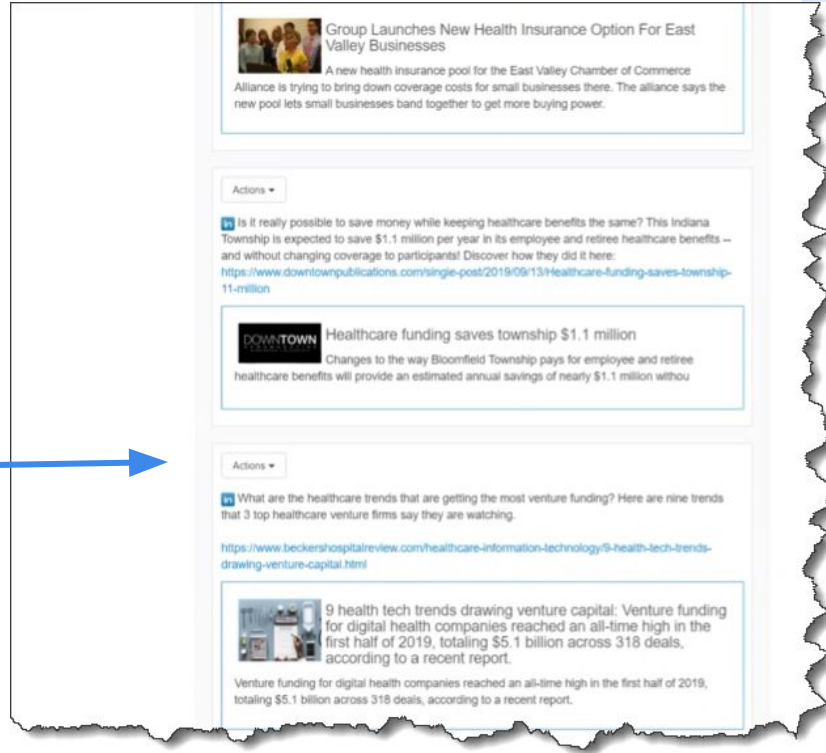
~~REFERRAL~~  
~~AMNESIA~~





Content - It's GO time!

# Approve Your Content



The screenshot shows a vertical list of content items. A blue arrow points from the left towards the first item. Each item has a header with a small image and a title, followed by a short text snippet. Below each item is an 'Actions' dropdown menu. The first item is titled 'Group Launches New Health Insurance Option For East Valley Businesses'. The second item is titled 'Healthcare funding saves township \$1.1 million'. The third item is titled '9 health tech trends drawing venture capital: Venture funding for digital health companies reached an all-time high in the first half of 2019, totaling \$5.1 billion across 318 deals, according to a recent report.'

**Group Launches New Health Insurance Option For East Valley Businesses**  
A new health insurance pool for the East Valley Chamber of Commerce Alliance is trying to bring down coverage costs for small businesses there. The alliance says the new pool lets small businesses band together to get more buying power.

Actions ▾

Is it really possible to save money while keeping healthcare benefits the same? This Indiana Township is expected to save \$1.1 million per year in its employee and retiree healthcare benefits – and without changing coverage to participants! Discover how they did it here:  
<https://www.downtownpublications.com/single-post/2019/09/13/Healthcare-funding-saves-township-11-million>

**Healthcare funding saves township \$1.1 million**  
Changes to the way Bloomfield Township pays for employee and retiree healthcare benefits will provide an estimated annual savings of nearly \$1.1 million without

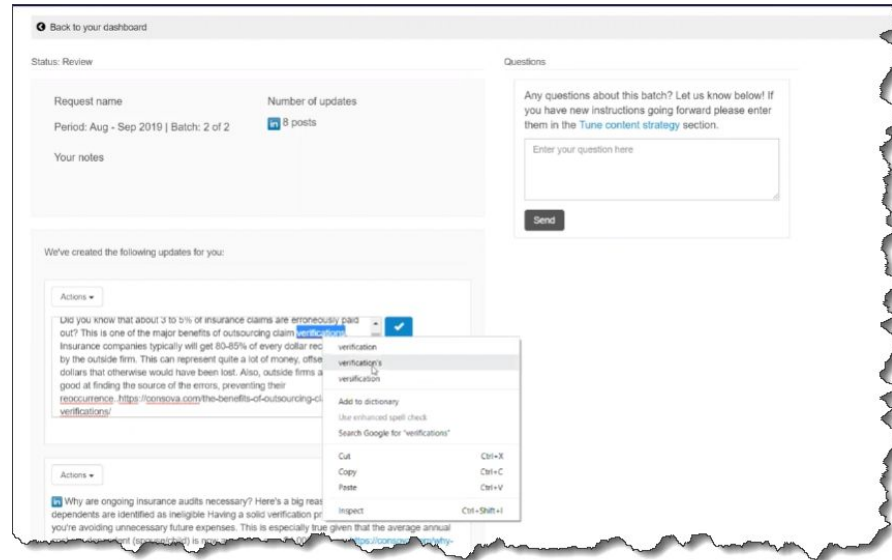
Actions ▾

What are the healthcare trends that are getting the most venture funding? Here are nine trends that 3 top healthcare venture firms say they are watching.  
<https://www.beckershospitalreview.com/healthcare-information-technology/9-health-tech-trends-drawing-venture-capital.html>

**9 health tech trends drawing venture capital: Venture funding for digital health companies reached an all-time high in the first half of 2019, totaling \$5.1 billion across 318 deals, according to a recent report.**  
Venture funding for digital health companies reached an all-time high in the first half of 2019, totaling \$5.1 billion across 318 deals, according to a recent report.

[app.emphatic.co/review](https://app.emphatic.co/review)

# Giving Feedback On Your Content



[app.emphatic.co/review](https://app.emphatic.co/review)

# Set Your Posting Schedule

Choose when the queued content in your queue will go out

\*All times for this account are in CDT

[Back to Settings](#)

Facebook [LinkedIn](#) [Twitter](#)

Facebook Schedule

Rule 1:  
Schedule d for: Mon Wed Fri  
at 10:30 AM , 02:30 PM

[Edit Rule](#) [Delete Rule](#)

[Add Another Schedule Rule](#)

[app.Emphatic.co/settings/schedule/](https://app.Emphatic.co/settings/schedule/)

# Best Time to Post on LinkedIn

Wednesday

8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM

Lowest Engagement: Sunday

# Best Time to Post on Facebook

**B2B: Tuesday, Wednesday, or Thursday**

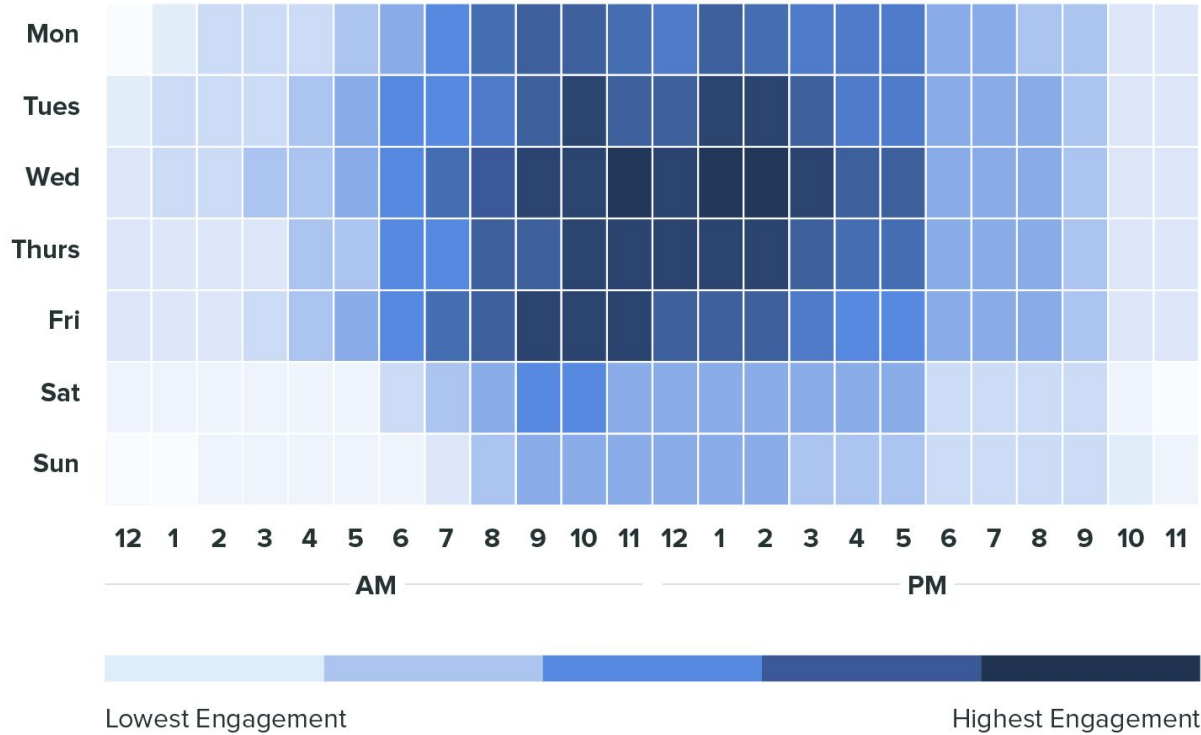
8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM

**B2C: Monday, Tuesday, or Wednesday**

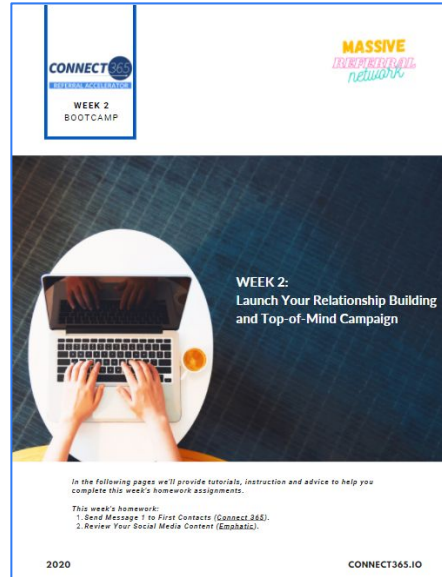
8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM

# Facebook Global Engagement

sproutsocial



# Download the workbook:



[Connect365.io/workbook-2](https://connect365.io/workbook-2)

*"Don't watch the clock; do what it  
does. Keep going."*

*~ Sam Levenson*

On the next:



Week 3:

Why Most Referral 'Systems' Fail...And How to Automate Your Follow-up and Ongoing Top-of-Mind Campaign

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