

CONNECT 365
REFERRAL ACCELERATOR



Take
the
lead.



WEEK 4:

Replenishing Your Referral Network Funnel

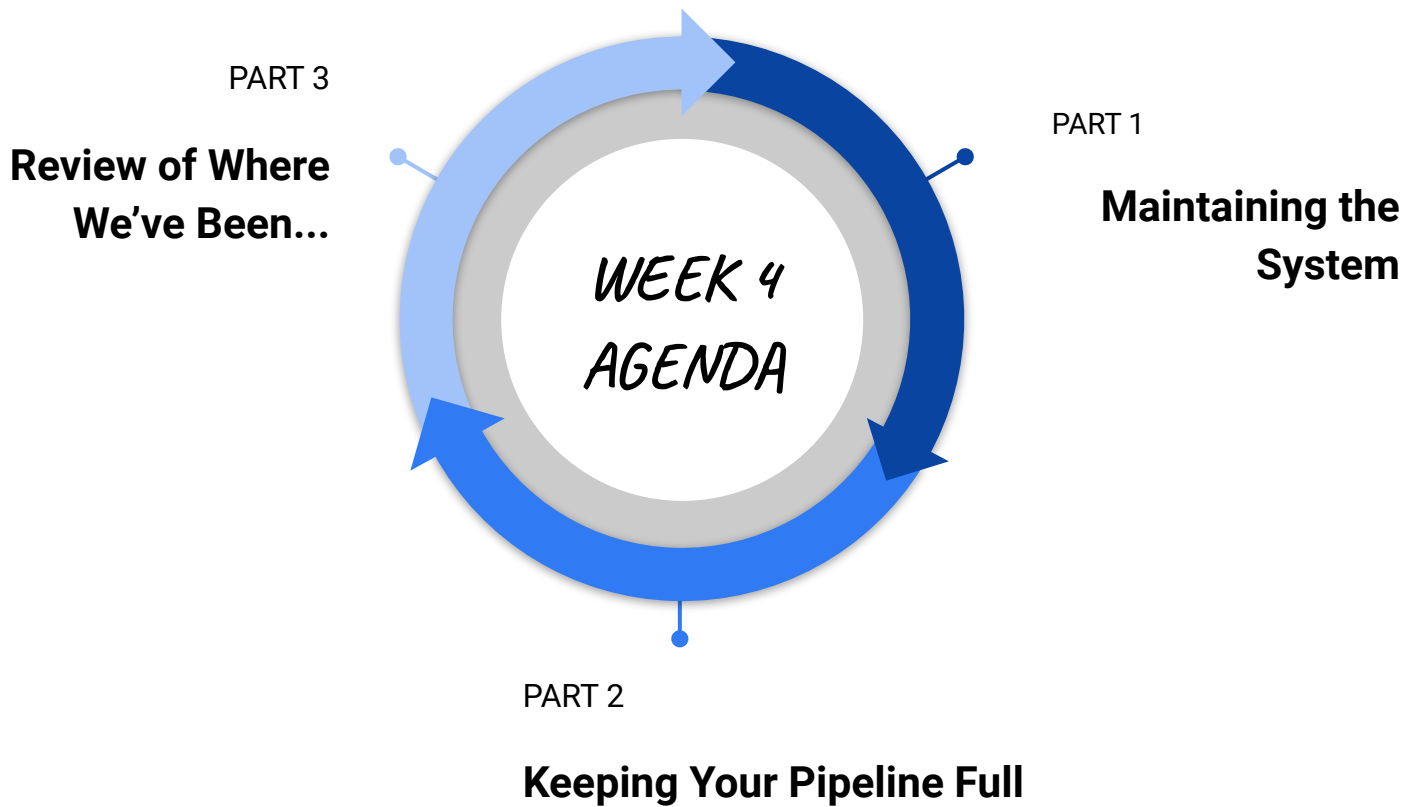
Previously on...

Homework:

1. Write the Next Message
2. Map Out Your 12 Month Nurture Campaign

Review at:

training.Connect365.io/mrn-3



Homework:

1. Connect with your Next 20 Referral Prospects.
 - a. Tag them into your campaign.
2. Review Your Next Batch of Social Media Content (Emphatic).

Download the workbook at:
[Connect365.io/workbook-4](https://connect365.io/workbook-4)



REFERRAL ACCELERATOR

Important Info:

- Workbook** → connect365.io/workbook-4
- Training** → 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~~





18%

Higher increase in revenue for companies with a formally defined sales process.



72%

Of sales managers hold pipeline review meetings multiple times per month.



Make a plan.

Most importantly

That you can stick to!

Keeping Your Pipeline Full



The Progress Principle

Prospect -> Lead -> Partner

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

- Harvard Business Review

Review Queued Content

In progress

Review Upcoming

Need to change your upcoming content? [Update your credit allocations](#)

Name

Trial request for LinkedSelling

2 How often would you like to receive content?

We have set a default frequency based on the allocations you've made that balances frequency and size. But you can set it just the way you like!

Acct	Frequency per billing period
LinkedSelling	<input type="text" value="v"/>

Save Cancel



LinkedIn



Connect with Your Next 20
Referral Prospects

*Did you save your search from last
time?*

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
Vestaburg, 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: Next 20 Prospects to add to your email follow-up and social media top-of-mind campaign

***Download the workbook at:
connect365.io/workbook-4***



Agency

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



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

[in.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

[sasprmo](#)

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.



Upload Contacts

Review Week 2 for Uploading Process



DASHBOARD

CAMPAIGNS

CONTACTS

TAGS

MAIL ACCOUNTS

SETTINGS

NEED HELP?

RESOURCES



ALL (12288)

IMPORT CONTACTS

Search Contact



EMAIL ID



Import Contacts



Export



Create Contact

ALL

DO NOT MESSAGE

Total Contacts: 12095

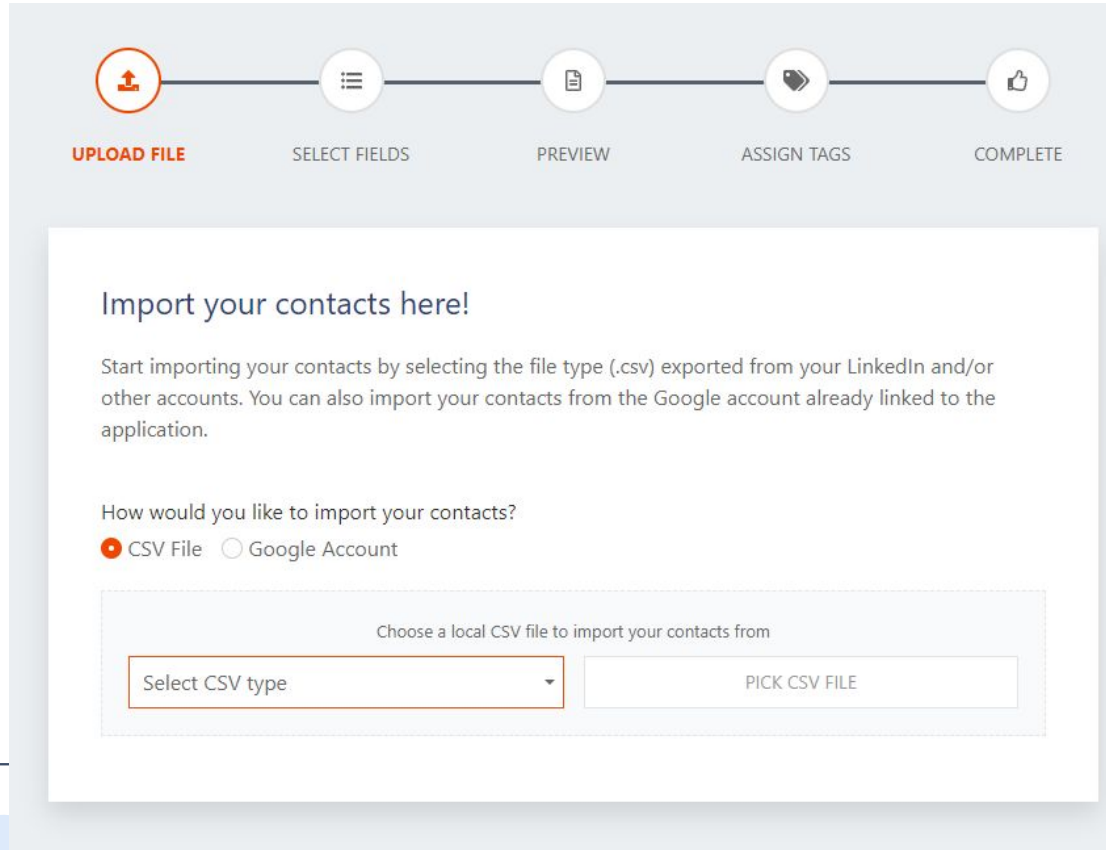
Show 50 Records

NAME TITLE EMAIL ADDRESS TAGS

DATE 1 ACTIONS



Review Week 2 for Uploading Process



The screenshot shows a five-step progress bar at the top: 1. **UPLOAD FILE** (highlighted in orange), 2. SELECT FIELDS, 3. PREVIEW, 4. ASSIGN TAGS, and 5. COMPLETE. Below the progress bar, the main content area is titled "Import your contacts here!". It contains a paragraph of instructions, a question "How would you like to import your contacts?", and two radio button options: "CSV File" (selected) and "Google Account". Below these options is a dashed-line box containing a prompt "Choose a local CSV file to import your contacts from" and two input fields: a dropdown menu labeled "Select CSV type" and a button labeled "PICK CSV FILE".

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

Review Week 2 for Uploading Process

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.

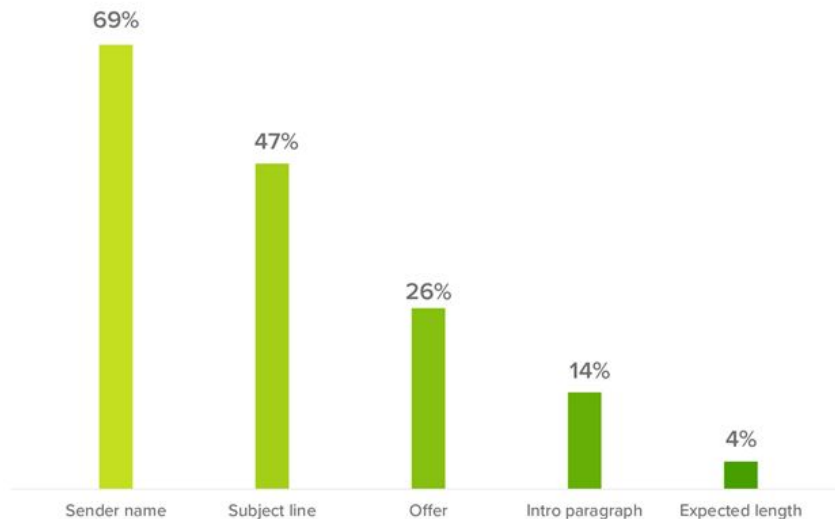
+ SELECT TAGS

PREVIOUS NEXT



Content Review

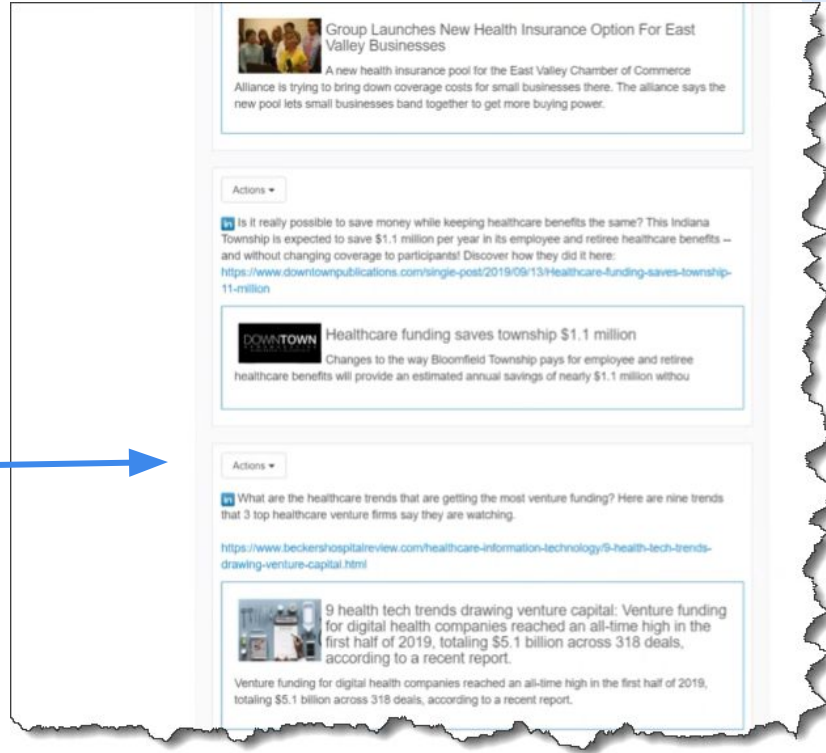
Reasons for opening an email



69% of recipients open an email because they recognize the sender name.

*SuperOffice

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 small image, a title, a short description, and an 'Actions' dropdown menu. The first item is about a new health insurance option for East Valley Businesses. The second item is a link to an article about healthcare funding saving a township \$1.1 million. The third item is a link to an article about healthcare trends drawing venture capital. The fourth item is a link to an article about digital health companies reaching an all-time high in venture funding.

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

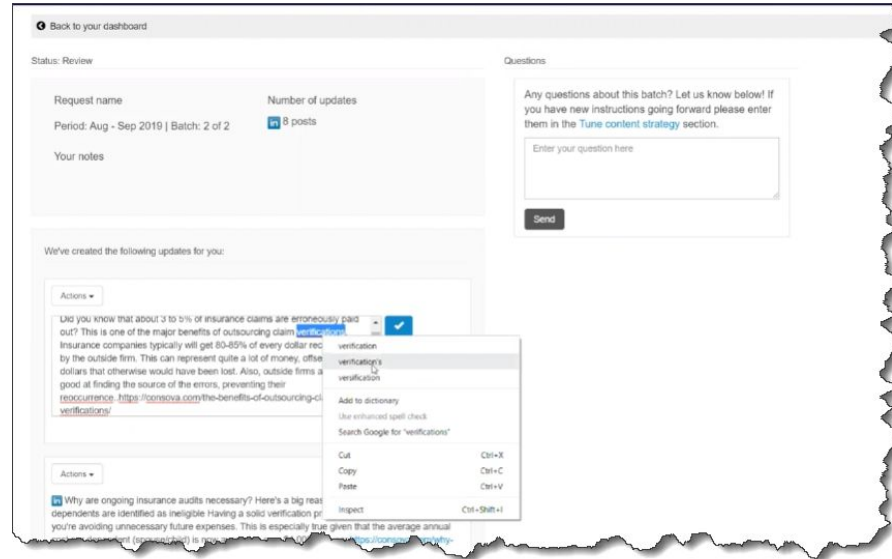
Actions ▾

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.
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app.emphatic.co/review

Giving Feedback On Your Content



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/

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

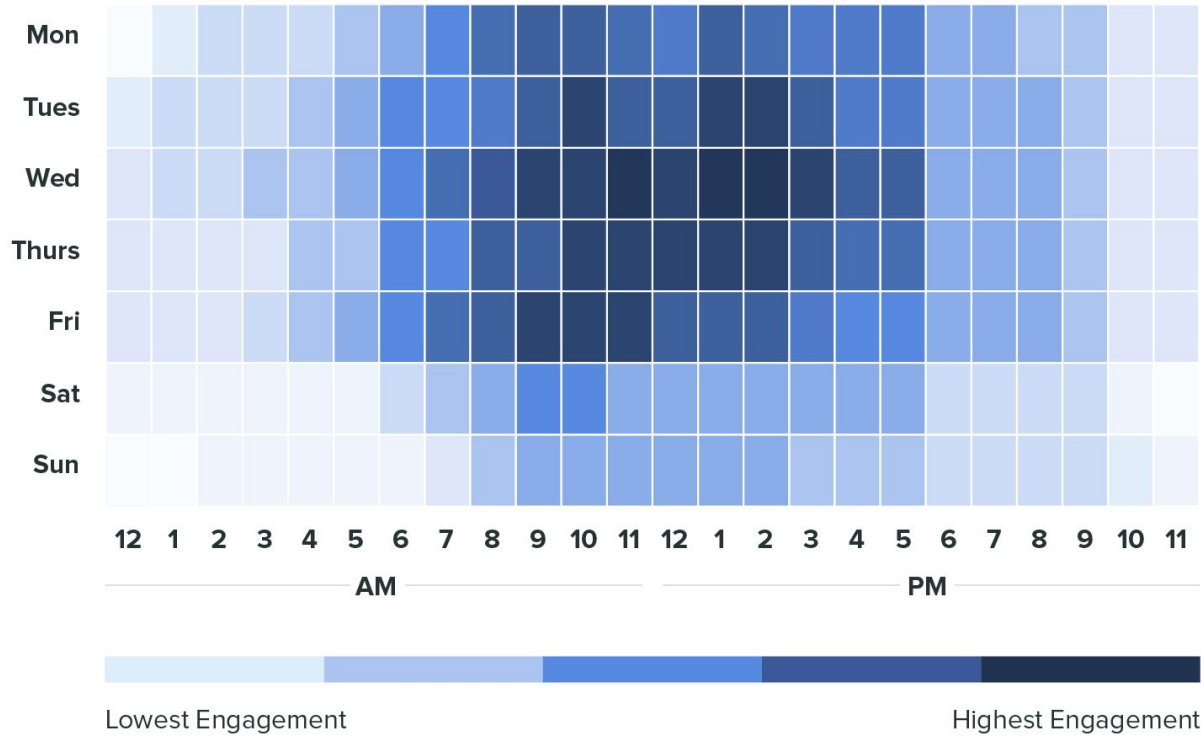
8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM

B2C: Monday, Tuesday, or Wednesday

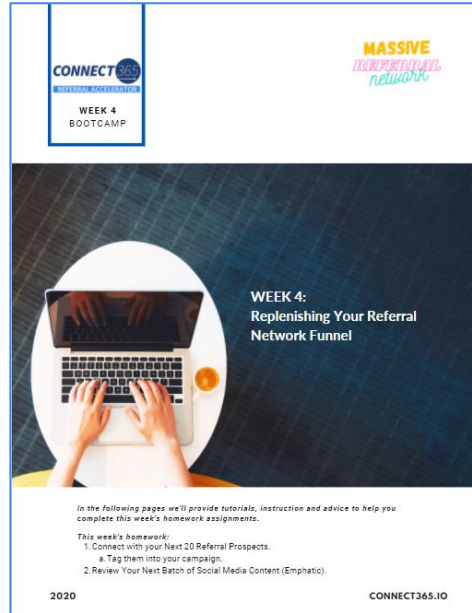
8AM 9AM 10AM 11AM 12PM 1PM 2PM 3PM 4PM 5PM 6PM 7PM 8PM 9PM 10PM

Facebook Global Engagement

sproutsocial



Download the workbook:



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

~ Sam Levenson

Thank You For Joining!



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Training



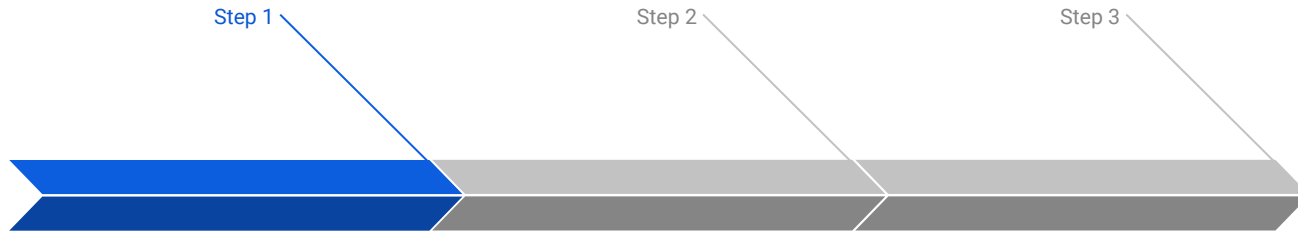
training.connect365.io

Questions?



support@connect365.io

MASSIVE
REFERRAL
network



Prospecting

How to Identify and Connect with Your Top Referral Partners.

Messaging

How to begin personal relationships with your prospects at scale.

Influence

How to stay top-of-mind with your network through follow-up and social media content

~~REFERRAL~~
~~AMNESIA~~



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