

Getting Referrals in a Virtual Networking World

XPX New Jersey



The Purpose of This Workshop

To present you a simple system to develop COI relationships from scratch to high quality referrals.

And to provide two tools to get you there.



THE 4 STEP FEARLESS REFERRAL SYSTEM™



THE REFERRALS ACADEMY | RAINMAKER TRAINING FOR PEAK BUSINESS DEVELOPMENT
Phone: +001 (312) 622-3121 - Matt@MattAndersonIntl.com - www.matt-anderson.com

FIRST DO THIS:

Prioritize Your Referral Sources – Apply the
80-20 Law

(80-90% of the professionals you meet will
never refer you anything)

ABC Tiers

The Rabbit Trap



TOP 6 REFERRAL SOURCES

1. Sent multiple high-quality referrals/year
2. Plays role of mentor/sounding board/trusted advisor
3. Pretty good friend
4. Can open great doors into new market
5. See them 4-6 times/year

Source: Lewis Schiff, *Business Brilliant* (2013)



“Who are the ones who have really, really stepped up and have thought about me, either brought opportunities or other great people to me, or just fit really well with my network and my clients’ needs? They go into my A list.”

- Gregg E., insurance executive, Chicago

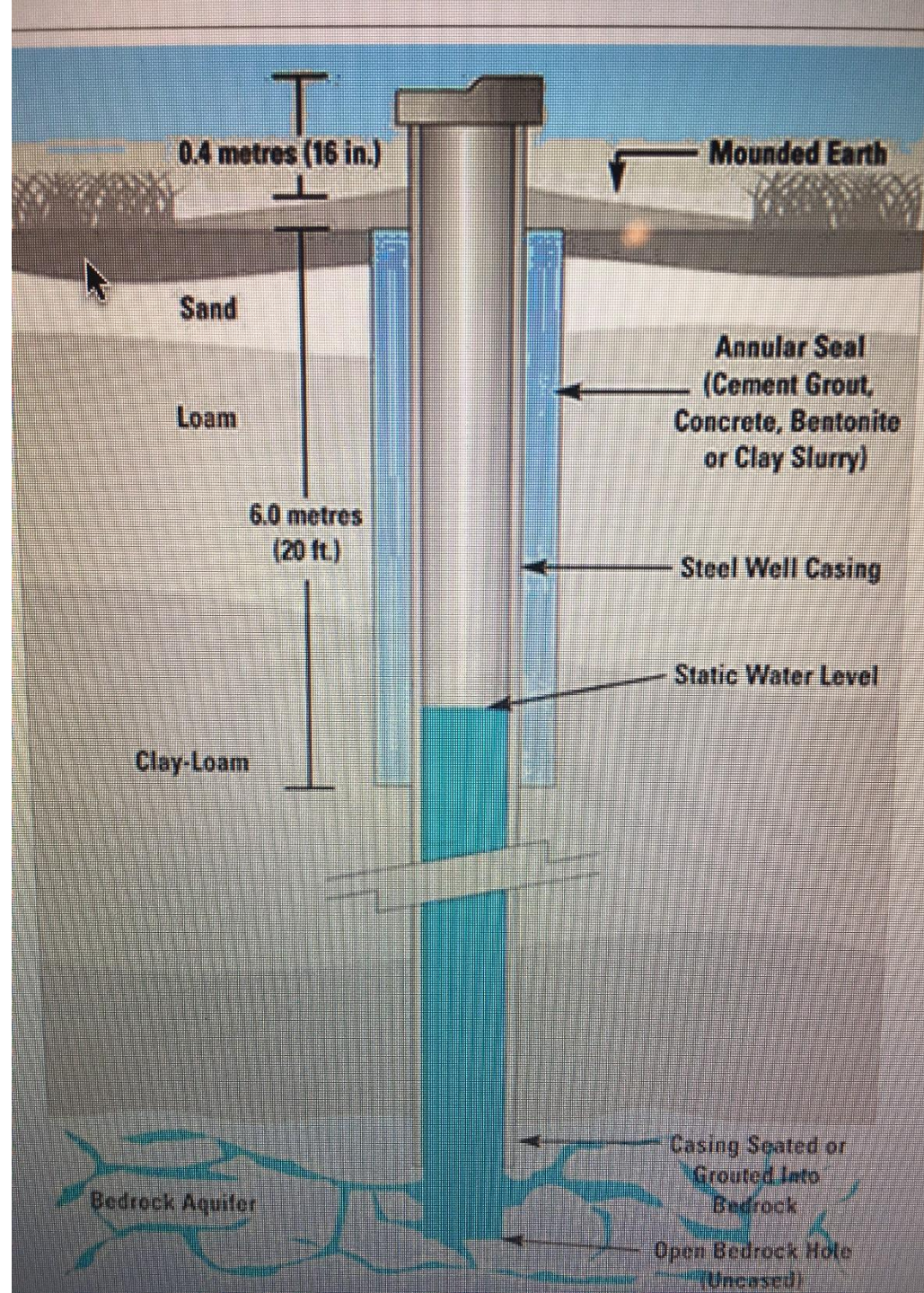


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Is there **WATER**
in the well?



How can I **MOST** add value to this person?

- Degree of thoughtfulness that counts
- **FEELING** people get from you
- **25% Extrinsic 75% Intrinsic**



Sharon, Boston, went to son's book signing

Steve, Houston, flowers

Maureen, Philadelphia, Broadway tickets

Suzanne, found job for their son

Oliver, London, his firm sponsored event

Bill, Boston, collected silent auction items

Adam, London, provided speaker

Emily, NY, shared some great biz ideas



Rick, Dallas, t-shirt – brewery

Craig, DC, elephant wine bottle holder

Marc, Tampa, travel guide to Belize

Kevin, UK, found investors for their biz

John, Ottawa, Michelin restaurant meal

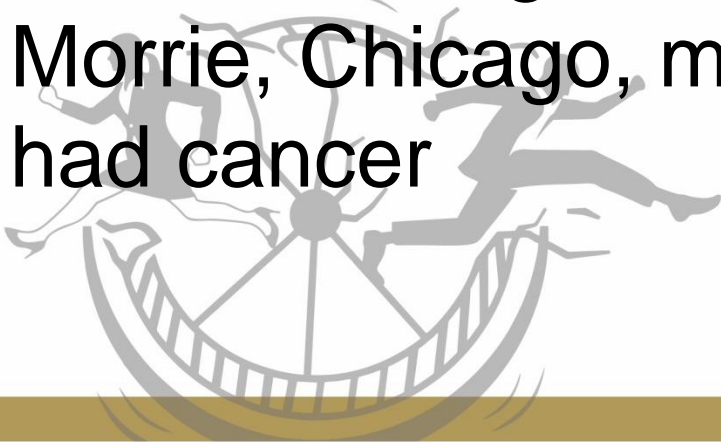
Mebs, Toronto, golf pro master class

Darren, London, requested mentoring for

Porsche racing



Mary, Iowa, live music event on a boat
David, DC, jazz concert and scotch gift
Sue, New York, brought in speaker to help
them bring in more biz
Blair, San Diego, jogging partner
Jean, L.A., non-profit committee
Jason, Chicago, sent inspiring book
Morrie, Chicago, made lentil soup when he
had cancer



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Make it **EASY** for
people to help you
by **BEING**
SO
CLEAR
about what
you want

That they
don't have to
think about it



Don't waste your time by saying:



**BREAKTHROUGH
BOUND**

“If you can think of anyone else who might benefit from our services, please have them give me a call!”

Please: Stop saying ANYONE



You should never again hear



**BREAKTHROUGH
BOUND**

“Let me think about it.”



Definition of a Specific Ask

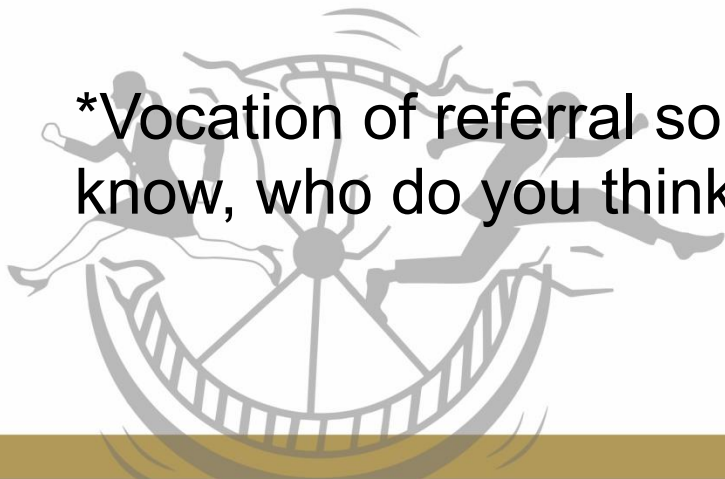


*Actual person's name is best: Michael Stevens

*Job title: Owner of ABC Machine Shop

*If a specific situation in life – the one person that they like the most, e.g. “of your other friends who run businesses, who do you get on best with that you’d be most comfortable introducing me to?”

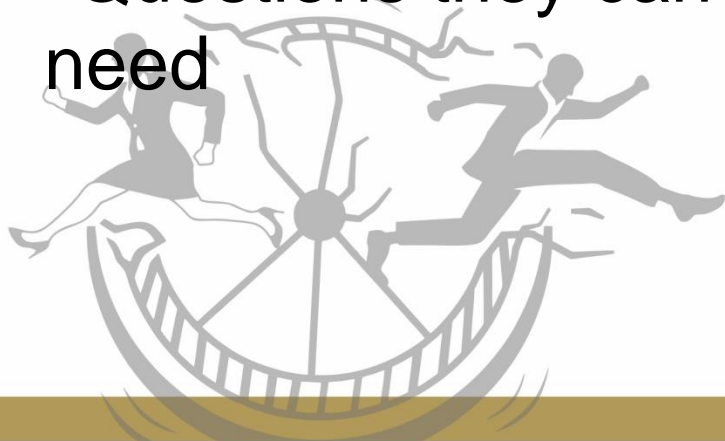
*Vocation of referral source: “Of the M&A attorneys you know, who do you think does the best job?”



Create a Target Sheet



- *Prospect list
- *Names: companies, people, professions, industries
- *Titles of people you want to meet
- *Situations when you can help people most
- *Professions of your best referral sources
- *Speaking opportunities/topics and events you host
- *Pain points to listen for
- *Questions they can ask others that might lead to a need



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1:1 Relationship Meeting Sheet

WHO: _____ **Referral Source:** _____

WHEN: _____ **Birthday:** _____

1. Key Info: (kids, passions, common ground)

2. What type of planning/work do you do with your clients? (use back)

3. WANTS TO MEET/BIZ YOU MOST WANT?

Network Strengths:

Also: 4. What other professionals work with your clients?

5. Where do you get your business?

What do you need help with right now?

6. What else are you hoping to accomplish this year?

7. How have you worked with (people in your vocation) in the past?

I'VE ASKED THESE PEOPLE IF THEY'RE INTERESTED.....DATE OF REQUEST:

I INTRODUCED THEM TO..... ON XYZ DATE.

Intros/value Received

8. Do you mind if I tell you a little more about what I do?

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**Coach your
referral sources**

Tom Bertolini has built a reputation as one of the greatest "GIVERS" in my network and think he is someone you need to know. Tom has built significant relationships and business resources in the Manufacturing/Distribution and Not-For-Profit industries with an exceptional C-Level/Executive Level network and he also supports a number of charitable causes. He is a Senior Vice President at ABC Services, a highly regarded business services firm who I have recommended to my business peers and clients. He is someone that would be exceptional to have in your network and will help you anyway he can.

Colleen Brewer is President of RST Construction, a Commercial General Contractor, Construction Manager and Owner's Representative. Her team's services include **Strategic Facility Planning, Facility Assessment, Budgeting, Estimating and Project Management** throughout construction. RST Construction's proven processes, developed over a quarter of a century, effectively structure solutions throughout the construction process to align and achieve their clients' goals in relationship to scope, budget, schedule and quality.

Linda Hoffman is a Senior Director with EDF Private Wealth Management. Her expertise is in guiding successful entrepreneurs and wealthy families through the transfer of ownership of their privately held companies.

With significant experience regarding liquidation events, mergers & acquisitions and exit strategy, Linda is one of the few wealth managers that truly specializes in taking business owners comfortably through the "Owner to Investor" transition.

Linda works very collaboratively with internal and external partners to:

- Advise the owner on strategies to maximize the value of the business pre-sale
- Conduct tax mitigation planning to maximize net proceeds
- Ensure owners and their families are personally and financially prepared for the next chapter of their lives

Scott Johannsen runs XYZ Partners. XYZ works with hundreds of businesses and properties nationwide to help them reduce their energy costs. They do this in three meaningful ways: (1) finding an alternative energy supplier that's lower's a company's energy costs; (2) controlling use and power going into the business with additional surge protection; and (3) battery storage solutions to help manage costs. Scott is always looking to bring value to his relationships and is a good connector.

I would like to introduce you to **Jeremy Nowakowski** at IJK Capital. IJK is a New York-based boutique investment bank focused on mergers & acquisitions. Jeremy leads the Food Group and works with a large number of food and beverage investors, companies, and family offices across the globe. I believe you would find value in comparing notes with him.

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Always have a next step
beyond waiting for the
phone to ring



CONTROL: TEST THE WATERS!

**How people follow up
separates the walkers
from the talkers**



Why You Test the Waters



1. Everyone talks a good game during a meeting
2. People show their true colours afterwards
80% of the time (life happens for some)
3. Most people are quite nice but most people are NOT wired to be good connectors



Ways to Test the Waters

1. What did they mention that you'd like more info on?
 2. Event?
 3. Book?
 4. Online?
 5. Other resource?
 6. Anything personal – good restaurant?
- *Make sure you do the same for them!





Remember:

- 1. The Valley of Disappointment (James Clear)
- 2. Internal discomfort is a sign you are GROWING!

Who I am becoming:

1. ↑ Effective @ generating business

WHY?

MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL																				
HABIT	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
# CoI Mtgs																																	
# CoI Touches																																	
# Specific Asks																																	

MONTH	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL																				
HABIT	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
WEEKLY																																	
Top 10 CoI Touch																																	
MONTHLY																																	
xpx																																	

What you need to do after this session to start getting more business!

Keeping it SIMPLE:

Mindset

More meetings, touches and asks

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Network Strengths:

Also: 4. What other professionals work with your clients?

5. Where do you get your business?

What do you need help with right now?

6. What else are you hoping to accomplish this year?

7. How have you worked with (people in your vocation) in the past?

I'VE ASKED THESE PEOPLE IF THEY'RE INTERESTED.....DATE OF REQUEST:

I INTRODUCED THEM TO..... ON XYZ DATE.

Intros/value Received

8. Do you mind if I tell you a little more about what I do?

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1:1 Relationship Meeting Sheet

WHO: ~~XXXXXXXXXX~~

Referral Source: Paul Neil

WHEN: 7.7.20

Birthday: _____

1. Key Info: (kids, passions, common ground)

2. What type of planning/work do you do with your clients? (use back) over

3. WANTS TO MEET/TYPE OF BIZ YOU'RE MOST LOOKING FOR? **Network Strengths?**

N/A
B/C
T/E

Also: 4. Which professionals typically refer you the most business?
your business? - Ref from MO, network & their professional & curiosity of calls

5. Where do you get your business? curiosity of calls

- Events, seminars
- ① Law firm - Wetherill & Co
- ② CIA - Quintanilla
- Muller

③ Purwood Group

④ Sore FAs

What do you need help with right now? (HOW CAN I HELP THIS PERSON MOST?)

Trend where am I today?
- aval play
o lost job back on track
o the acquisition for those struggling - need capital

6. What else are you hoping to accomplish this year?

7. How have you worked with (people in your vocation) in the past?

I'VE ASKED THESE PEOPLE IF THEY'RE INTERESTED.....DATE OF REQUEST:

- 7.8 ✓ Seidman? 2.8 Scott Henderson?
- 7.8 ✓ Morse? 7.8 Heckman?
- 7.8 ✓ Carl?
- 7.8 ✓ Popoway?
- 7.8 ✓ Hudlett?

I INTRODUCED THEM TO..... ON XYZ DATE.

Intros/value Received

8. Do you mind if I tell you a little more about what I do?

Monday, Feb 10 - (May 4)

kte Boston - 1-250

MM Inc 3 units 10m/yr → 500m/yr
180000 - 2m - 50m (a row)

Demand for ① + ② +
lawyer, acct +
turnaround
guys
part of labels
to him?
it's a...
inter...
7m

① Name equity

Name equity, debt,
c/o ~~collateral~~ under +

(Ind.)
↓

Investor (1750) website

Physi...
Group + name
Capital

"Mittler - Telson"

Broad exp ind
1.MD = automotive
1.MA - retine, medical device

Fo's
fund...
Reason ~~for~~ funds
PE firm
A/T Under
Banker.

② MTA

→ vet companies for sale
• #1 evaluation +
buying capital + title

(Key or
for names)

• ① entry to 50, not w/ leadership
Evaluation, analytical & work

Prefer 60 months out "vis map" name

③ 665-1

Mexico: Alaska, Alaska
Delhi, India
ATL, GA.
Austin, TX (on way)

Name - Chicago, Ind + Midwest
Some CA, NC

[See More](#) from Matt Anderson

Found in Sent - Exchange Mailbox

Matt Anderson

four interested introductions for you - LMK if any appeal

To: Dane [REDACTED]

Hi Dane,

Great to speak on Tuesday.

So far, four high quality people have expressed interest to me in meeting with you.

Truly they are all very strong and perhaps not exactly what you typically seek except for David. The only person who I'm not sure about him being hardwired as a connector is David, the lawyer (!), but he has the client base you.

I TAKE ZERO OFFENCE IF YOU DON'T WANT TO MEET ANY OF THESE PEOPLE.

I do think it's a mistake to skip on Carl because he is such a natural and he's worked in the MM Chicago world for 25+ years (so have Allen and David)

1. Carl [REDACTED] runs an exec search firm company - BRILLIANT CONNECTOR, sincere guy - doesn't throw people against a wall

I would like to introduce you to Carl [REDACTED] a founding Partner at [REDACTED] an Inc 5000 and Hunt Scanlon Top 50 recognized executive search and talent consulting firm. Carl works with high growth companies seeking to improve business performance through talent. Most of his clients are experiencing some sort of change, an event in their business and many are privately held or private equity backed mid market firms growing through M&A. I feel Carl may be someone worth connecting you to for opportunities.

[https://www.linkedin.com/in/carl\[REDACTED\]/](https://www.linkedin.com/in/carl[REDACTED]/)

2. Allen [REDACTED] Managing Principal at [REDACTED] - great guy

wrote to me: "I do at times have clients and relationships looking for capital partners. I see he's connected to a few others that do what I do so thinking he knows my business and if ways to reciprocate with heads of comp advisory services."

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

3. David [REDACTED], principal - biz lawyer at Fischel & Kahn. High integrity, eclectic biz network

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

4. Scott [REDACTED] legit turnaround expert - unconventional - got the knowledge and experience replied"

"this would be a great connection to help him on assessing the turnaround talent gaps of the teams he's investing in"

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

To be breakthrough bound,

Matt

"We settle for the illusion society sells us that meaning is in self-focus – self-esteem, self-improvement. But the wisdom literature of thousands of years repeatedly validates the reality that the greatest fulfillment in improving ourselves is in empowerment to more effectively reach out and help others. Quality of life is inside out. Meaning is in contribution, in living for something higher than self."

Stephen Covey

Founder, Breakthrough Bound

+001 (312) 622-3121

Breakout Questions



1. What type of business are you most looking for? (DIG to get to SPECIFICS!)
2. Which professionals typically refer you the best business?
3. Where do you get your business?





Your Questions

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And to provide two tools to get you there.



Feedback Form



Email: Matt@BreakthroughBound.com



**Thanks to you,
John Dowd and
XPX!
– Matt Anderson**



**BREAKTHROUGH
BOUND**