

Referral of a Lifetime Syllabus



Session One Four Hours Relationship/Referral Principles

Relationship Building - 101
Business Relationships Defined and Revealed
Putting the Relationship First
Are you where you should be?

Relational Funnel

Attrition and Retention
Industry Average
Perceived Indifference

Referrals Cycle
Methods

The Referral Driven Business

Showing Appreciation

Ten Components to Success

Marketing Methods and Flaws
Industry Averages and Solutions
Sales and Response Forecast and Worksheet

Review and Address
Open Forum for business issues and discussion

Homework: Read the Referral of a Lifetime

Assignment: Bring the best information you have about the current business, average customer value, and competition notes

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Session Two

Four Hours

Getting to Know

Session One Review

Discussion and Direction

Discussion Points

- Defining Your Start
- Mission and Goals
- Products and Services
- Business Climate and Conditions
- Competition SWAT

Defining Your Start

*Worksheet

- Getting to where you are - How & Why
- Business Endeavor and Decision
- Competition Profile Review
- Pricing Model Strategies

Mission and Goals

*Worksheet

- Current Year
- Next 12 Months
- Two Year Goal
- S.M.A.R.T Test

Products and Services

*Worksheet

- Trends and Developments
- Target Market
- Suspects & Prospects

Business Climate and Conditions

*Worksheet

- Trends and Developments
- Technology
- Barrier to Entry
- SWAT

Competition

*Worksheet

- Features, Benefits, Failures, Boneheads

Review and Address

Open Forum for business issues and discussion

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Homework Complete worksheets not complete, three articles about industry and trends, three web-sites of potential competition, written and acknowledges goals.

Assignment

Bring your database &/or customer list in whatever shape to next session. Need to know name, address, email, industry, business volume, phone, referrals.

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Session Three Four Hours Database Plan

Session Two Discussions and Directions

Discussion Points

250 x 250 Rule
Database Development
Just Let Them Know
Communication Plan

The 250 x 250 Rule

The ABC's of Your Database **Worksheet*
Know (C), Like (B) and Trust (A)

Communication Plan **Worksheet*
Print, Electronic, Phone, Gifting
Develop Plans

Reposition / Confession Letter **Worksheet*
Craft Letter & Establish list

Review and Address
Open Forum for business issues and discussion

Keep-InTouch® System
Demonstration

Homework - send 20 personal notecards to close contacts, phone and reconnect with 5 contacts you haven't seen for more than 4 months, make arrangements to stop by two good customers, send call a mentor to discuss your respect for them.

Assignment: catalog your experience and bring your notes to the class.

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Session Four Four Hours Building Your Database

- Spheres of Influence **Worksheet*
Industries Sharing Similar Customers

- Partners in Strategy **Worksheet*
Industries that Benefit When You Get Business
Build a Business Directory

- Educate your Partners **Worksheet*
How you work
Best Referrals
Hesitant Referral

- Review and Address*
Open Forum for business issues and discussion

***Assignment Complete sheets not finished during session
Take DISC
Bring results***

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Session Five Four Hours Networking & Referrals

Planning Your Network, Networking Your Plan
 Goal Sheets **Worksheet*
 Business Needs

Elevator Speech **Worksheet*

Event Management
 Practical Role Playing

Communication Styles DISC **Worksheet*
 Business / Business
 Business / Relationship
 Relationship / Business
 Relationship / Relationship

Review and Address
 Open Forum for business issues and discussion

Homework: attend a networking or social event alone, make three new relationship, send follow-up cards, and build communication FUP plan. Complete a “Get2Know” for one other class mate.

Assignment: Bring recommendation or names of opportunities for those in the class.

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Session Six

Four Hours

Activation & Recognition

Customer Appreciation
Event Planning
Suggested Events

Trusted Advisor
Core Values and Beliefs
Processes
Time Management
Consistency Counts
Communication Principles
Build You : The Brand

Implement Keep-InTouch® Practice