

B2B Training

How to Close \$10 Million In Business Per Year
Through B2B Referral Relationships



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Opening Call Scripts

When looking for a strong opening with a possible new business referral source, try one of the options below.

Always do your research before making the call to determine what approach would work best with the referring source. Don't overthink this. Any attempt is better than none. Don't leave voicemails if possible. Do it LIVE!

THE BUDDY

Trying to get to know a friend of a friend you've heard great things about? Invite your buddy and their buddy for an outing.

THE MENTOR / FLATTERY

For the successful business person you look up to & may start referring to you on a trial basis.

THIS TOWN IS SMALL

Similar to the Mentor call, state you see their name often in your line of work & think it'd be mutually beneficial to meet.

I'VE GOT LEADS

Because your businesses are similar, you're looking to share the right leads of yours & they might return the favor.

I JUST FIRED MY _____

You're interviewing them to do your personal business, and might be a referring source in the future too.

I HOST AN EVENT THAT HELPS OTHERS

If you have common philanthropic ideals, they may be interested seeing your good work & sending leads your way.

Example #1

THE BUDDY

Trying to get to know a friend of a friend you've heard great things about? Invite your buddy and their buddy for an outing.

Example:

You: Hi, it's great to finally talk to you! I've heard a lot of good things about you from _____ (our mutual friend.)

(Optionally, ask how their day is going to break the ice)

You: I was actually hoping to get to know you and your business a bit better outside of work. (Suggest a specific activity or place if you have something in mind.)

You: How does next week sound? I can check with _____ (our mutual friend) to see what works for them and we can all plan something together.

(Optionally, mention why you're interested in getting to know them better, such as wanting to learn from their business experience or wanting to expand your network)

You: It was really nice talking to you and I'm excited to connect more. I'll follow up with _____ (our mutual friend) to see when they're available and we can make some plans.

Notes

Example #2

THE MENTOR / FLATTERY

For the successful business person you look up to & may start referring to you on a trial basis.

Example:

Hi [Mentor's Name],

I hope this call finds you well. I've been following your work in [industry/field], and I've been really impressed by your achievements and expertise. I believe that I could learn a lot from you, and I would be honored to have the opportunity to meet you in person and discuss your experiences and insights over lunch.

If you have some availability in the coming weeks, I would love to take you out to lunch at a place of your choosing. Of course, I would be happy to pay for the meal.

Thank you for considering my request, and I hope to hear from you soon.

Best regards, [Your Name]

Notes

Example #3

THIS TOWN IS SMALL

Similar to the Mentor call, state you see their name often in your line of work & think it'd be mutually beneficial to meet.

Example:

Dear [Business Person's Name],

I hope this message finds you well. My name is [Your Name] and I work in [Your Profession/Industry] in [Your City]. I have been following your work for some time now and have seen your name come up frequently in my line of work.

I wanted to reach out and introduce myself, as I believe that we could potentially work together in a mutually beneficial way. Your expertise in [Their Field] and my experience in [Your Field] could create some exciting opportunities for both of us.

If you are open to it, I would love to set up a meeting with you to discuss how we can collaborate and potentially work together. Please let me know if this is something that interests you.

Thank you for your time and consideration. I look forward to hearing back from you.

Best regards, [Your Name]

Notes

Example #4

I'VE GOT LEADS

Because your businesses are similar, you're looking to share the right leads of yours & they might return the favor.

Example:

Dear [Business Person's Name],

I hope this message finds you well. My name is [Your Name] and I run a business in [Your Industry/Field] in [Your City]. I have been following your work for some time now and I have noticed that our businesses share many similarities.

I believe that there could be some mutual benefit in working together, particularly in terms of sharing leads and business opportunities. I have a number of contacts in my network that I think would be valuable to your business and I would be happy to introduce you to them.

I believe that we could create a strong partnership by leveraging our respective networks and working together to grow our businesses.

If this is something that interests you, I would love to set up a meeting to discuss further. Please let me know if you are available and we can arrange a time that works for both of us.

Thank you for your time and consideration. I look forward to hearing back from you.

Best regards, [Your Name]

Notes

Example #5

I JUST FIRED MY _____

You're interviewing them to do your personal business, and might be a referring source in the future too.

Dear [Business Person's Name],

I hope this message finds you well. My name is [Your Name] and I am currently in need of a [Their Profession/Service] for my personal business affairs. I came across your name in my research and I am impressed with your reputation and the work you have done in this field.

I recently had to let go of my previous [Their Profession/Service] and I am now looking for a replacement. I would like to set up a meeting with you to discuss your experience, expertise and how you could potentially help me with my business affairs.

I also believe that there could be potential for a mutually beneficial relationship between us in the future. If I am satisfied with your services, I would be happy to refer you to others in my network who may be in need of your services.

If this is something that interests you, please let me know and we can arrange a time to meet. I look forward to hearing back from you.

Thank you for your time and consideration.

Best regards, [Your Name]

Notes

Example #6

I HOST AN EVENT THAT HELPS OTHERS

If you have common philanthropic ideals, they may be interested seeing your good work & sending leads your way.

Dear [Business Person's Name],

I hope this message finds you well. My name is [Your Name] and I am writing to you because I have been impressed with the philanthropic work you have done in [Your City/Community]. I have been following your organization's activities and I believe that we share many common ideals when it comes to making a positive impact in the community.

I am reaching out to you because I am currently involved in a [Your Cause/Philanthropic Endeavor] and I would love to share my work with you. I believe that you would be interested in what I am doing and I would appreciate any advice or feedback you could offer.

Additionally, I believe that there could be some mutual benefit in our relationship. If you are impressed with the work that I am doing, I would greatly appreciate it if you could refer any potential leads or connections my way. I am always looking for opportunities to expand my network and collaborate with like-minded individuals.

If this is something that interests you, please let me know and we can arrange a time to meet. Thank you for your time and consideration.

Best regards, [Your Name]

Notes

Example #7

PROVIDING INFORMATION

If you have a new and unique strategy or way of doing things, they may be interested in hearing about it and potentially working with you.

Dear [Business Person's Name],

I hope this message finds you well. My name is [Your Name] and I am writing to you because I have been impressed with the philanthropic work you have done in [Your City/Community]. I have been following your organization's activities and I believe that we share many common ideals when it comes to making a positive impact in the community.

I am reaching out to you because I am currently involved in a [Your Cause/Philanthropic Endeavor] and I would love to share my work with you. I believe that you would be interested in what I am doing and I would appreciate any advice or feedback you could offer.

Additionally, I believe that there could be some mutual benefit in our relationship. If you are impressed with the work that I am doing, I would greatly appreciate it if you could refer any potential leads or connections my way. I am always looking for opportunities to expand my network and collaborate with like-minded individuals.

If this is something that interests you, please let me know and we can arrange a time to meet. Thank you for your time and consideration.

Best regards, [Your Name]

Notes

Close After Initial Meeting.

When looking for a strong close that will lead to a future referral, try one of the four options below. When reviewing your options, remember: be honest. Nothing stinks more than a phony phone call.



Close After Initial Meeting.

EXPERIMENT

For the business person that already has a person in your role, but has little to lose if they were to start using you.

Example:

"Listen, it sounds like you have a great relationship with ___ and have been working together for years. What I found is we don't know what we don't know... Let's do an experiment--for the next 90 days, alternate sending your current partner and I every other lead. I bet that we'll work well together. If I could help you close even one more deal than he/she does, then it's worth it for your business."

FOLLOW- UP

For the prospect that's open to working with you, and places a strong emphasis on knowing his/her team personally.

Sample Close:

"Before we start working together, I feel that it is important that we set a follow-up appointment at my office so you can see where your clients will go. We want you to know that we will represent you in the highest fashion. I also want you to meet my team so that you feel comfortable asking any of us for help."

Close After Initial Meeting.

INTERVIEW

For the person that is looking for someone in your role, but has others competing for the job or is hesitant to commit.

Sample Close:

"The truth is there is no way for us to really know we are a good match for each other until you try me out. I would like to interview for the job of being your _____. The way the interview works is you send me your next three deals and at the end we get together to discuss what did or did not go well. If I pass the interview, we will keep working together. If not, at least we both know."

HIGH ALERT

For the source that is going to start working with you, & you want to communicate that you will be waiting for their leads.

Sample Close:

"You said you get ____ leads a month, and have a good conversion ratio from this. I am going to tell my team to be on high alert for any emails or phone calls from you or your team. I will plan to follow up with you in two weeks to review the leads and our progress together."

Initial Questions for a Realtor to Ask at a Business Meeting



Initial Questions for a Realtor to Ask at a Business Meeting

'Rapport Building / Values' Theme

1. What got you started in your business?	2. What was your "past life" before your current career?
3. How do you spend your time when you are not working?	4. Who are some of your top influencers/mentors?

'Goal Oriented' Theme

1. How has your business been this year? How many clients did you help?	2. Do you track your leads? If so, how?
3. How many clients would you like to help annually?	4. What are you doing to grow your business?

Initial Questions for a Realtor to Ask at a Business Meeting

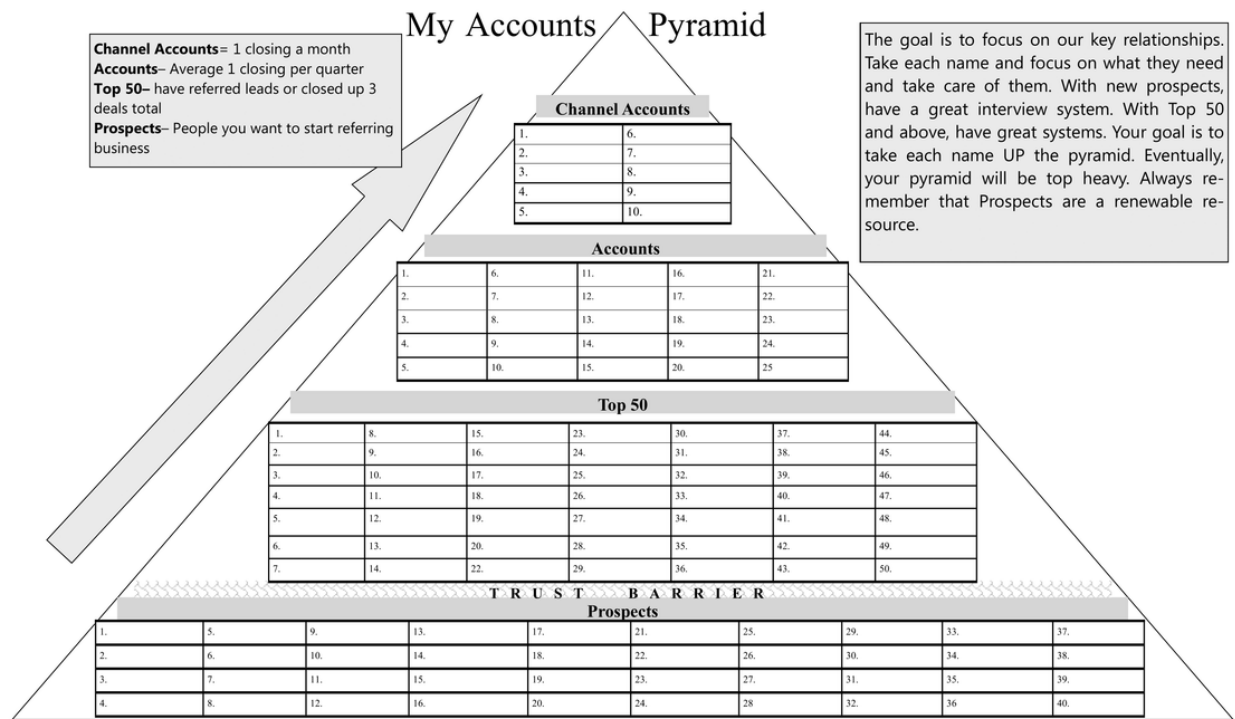
'Possessive / Assume the Sale' Theme



<p>1. Which Realtor (s) do you currently refer your clients to?:</p> <p>a. Who? _____</p> <p>b. How long? _____</p> <p>c. What do they do well? _____</p> <p>d. How could I be your backup? _____</p>	<p>2. What's the important about referring and working with a Realtor to you?</p>
<p>3. If you were to sell your own home or property, who would you work with? What causes you to trust them with your personal business?</p>	<p>4. Would you be against referring each other 3 clients this month to start to see if we are a good fit?</p>

'Flip The Sale' Theme

<p>1. If I were to refer you a client, walk me through your process—what should I expect to see?</p>	<p>2. What makes you different from your competition? And how would that help my clients?</p>
<p>3. Could you provide me some of your clients surveys or testimonials?</p>	<p>4. How would you like me to refer you to potential clients? What type of introduction do you like best?</p>

Accounts Pyramid



<div> My Channel Accounts</div>	
<div> My Accounts</div>	
<div> My Top 50</div>	
<div> My Prospects</div>	