

## HOW TO HOST THE ULTIMATE REFERRAL PARTY

### SET UP A TIME WITH YOUR REFERRAL PARTNER

Send a quick message that reads, “I woke up thinking about you today because I was looking through my texts and a few of my contacts, and I'm positive I could refer some really high-quality clients to you. Do you have some time to get on a Zoom with me, because I have a powerful way to make some referrals, but I'll need to ask you a few questions to make sure I give you some right fit people first.”

### UNDERSTAND EACH OTHER’S “PERFECT FIT” CLIENT

Take the time to define your perfect client’s demographics and psychographics. Communicate in clear language who they are. I recommend doing this in a Google doc that you can share. You and your referral partner should have at least a page to clarify this.

Here’s an example of mine:

#### **Mike’s Right Fit “Perfect Fit Client”**

- Visionary Entrepreneurs - Owner, Founder, CEO, Partner
- B2B Business > \$1mm-\$150mm+ in Sales, > \$5,000 Offers
- Proven Success, Transformations, Testimonials / Social Proof
- A History of Being Coachable / Coached
- “Belongers of” -> (YPO, EO, Vistage, Strategic Coach, Genius Network, Abundance 360, Tony Robbins, Darren Hardy, Brian Tracy, Simon Sinek)
- “I Have a Message, Want to be a TRUSTED AUTHORITY”
- Know a Strong Personal / B2C Brand BOOSTS Value + Pricing

- WANT TO or Have Written Books, TED/TEDx Talk, Have a Podcast, Media Trained, Needs a Strong Creative + Innovation Team
- Willing to Experiment, Iterate, and Test to Find Breakthroughs
- KOLBE Quick Start 8-10 (not fact-finders)

### **UNDERSTAND EACH OTHER'S EXACT OFFER:**

Make sure to take a few minutes to review and understand fully what your offers are. Share websites and case studies and give examples of your process if necessary.

At the beginning of the meeting with your referral partner, after building a bit of rapport and catching up, it's important to look at your list and explain who your target market is. Making your list of criteria helps make that easier.

As you are communicating, a mastermind effect is happening. You're starting to stimulate ideas in your referral partner of who to connect you with. The same is true for you. When your partner is communicating his or her target market, you are filtering through your contacts in your mind, and the most relevant ones will rise to the top. As they do, take notes.

A sales referral party is by far the fastest way to get customers that I know of that requires no website, no CRM, no advertising, no budget, no anything other than two people connecting and sharing referrals. But there are some really specific strategies involved in making this work.

1. Schedule a meeting with someone.
2. Set a timer
3. Each person gets a half hour
4. Ask what the other person's offer is
5. Who is the best fit? Who are not?
6. Start with mobile text, email, and social media. Google does a good job of summarizing.

7. Approximately 15 people.
8. Record a video.
9. Tell the referral why they should meet this person.
10. MOST IMPORTANT: You're talking about it. You're about it.
11. 90% of people respond.

## **TECH STUFF YOU'LL WANT**

For this strategy to work, you only need 5 Technical Resources...

1. A paid version of [zoom.us](https://zoom.us) (or whichever meeting software you're using). One of the key applications is being able to stream the meeting to YouTube and creating a shareable link.
2. Your cell phone.
3. Access to your database. (That could mean your email list, social media profiles, or wherever you store your contacts).
4. Google Docs
5. [Otter.ai](https://otter.ai) for transcriptions

There may be a little bit of a technical learning curve. Get through it. Don't wimp out. If you have to hire someone to get technical help, find the right "who," and DO IT. Once you get this system down, it is "rinse, wash and repeat."

## **CLICK-TO-SCHEDULE LINKS.**

I really, really recommend that you have one of the scheduling services like Calendly or Once Hub. Another tip (other than having your scheduling link) is to create a simple, easy-to-remember URL. For example, Charles's is [www.MeetCharlesByrd](http://www.MeetCharlesByrd)

- <https://calendly.com/>
- <https://www.acuityscheduling.com/>
- <https://www.bookafy.com/>

- <https://www.oncehub.com/>
- <https://simplybook.me/>

### **Make it “Them” Oriented - THE BRAINSTORM**

Conspire about who you want to connect your partner with. Who are they? What are they working on? What is the connection angle? Meaning what’s the ideal outcome from the connection?

[Name] from [place you met], [what you like and appreciate about them].

I think you guys could [potential collaboration]

### **The Connection Video**

- From Zoom, connect to YouTube
- Aim for 2 minutes or less
- Here’s an example <https://www.youtube.com/watch?v=bV5Vc9ijTj0>
- You set context for the other person, then ask them to speak about their offer.

### **SAMPLE DIALOGUE:**

**Mike’s Video for Charles:** “We are alive on YouTube. Okay, so I want to introduce you to my friend Charles Byrd. He is one of the most connected JV guys I know. He has been a great connection and referral partner for me personally and to everyone I’ve ever introduced him to. One of the things that he’s really good at doing is helping you look at all your lead sources with endorsed joint ventures, although he thinks a lot bigger than that, and he’s added millions to some of my clients, and I know he’s going to be able to do the same for you. So I think you just have to connect with him because you’re really gonna be values compatible and find other ways to work together. So Charles, why don’t you say a few things...

Yes, Mike, thanks so much. Yeah, I'd love to connect. Learn more about what you're up to and who you serve, and explore ways you can leverage endorse joint venture traffic to scale that up. It basically diversifies your lead sources in case you're dependent on something like Facebook ads. I've had many clients whose accounts have been shut down or not able to scale past a certain point. So we help them diversify. It's a plug-and-play system to JV strategy, identifying ideal JV partners and the whole system for snapping an end and getting it in production in less than five weeks. So if you'd like to chat about that, I'd love to chat with you. You can book well number one feel free to share your booking link with me. Or you can use mine, which is [MeetCharlesByrd.com](https://MeetCharlesByrd.com), and I'll put that in the description copy in this video as well. All right, so let me know as soon as you've connected tell me what's happened, and everyone always sends me the same message, which is Charles is awesome. Thank you for the intro. I'd love to hear what you guys end up doing together. Okay, Talk to you later. Thanks for watching. Bye.”

**Charles Referring Mike:** “Mike and Jackson, I'd love to connect you both. Mike Koenigs is a good friend of mine I've known for several years he is an expert at building brands and creating high-ticket offers. Several clients I've sent him have done extraordinarily well from his work and advice, and he's been in the game a while. He's consulted people like Tony Robbins, he's in the Genius Network, Flight Club... He's everywhere you want to be.

In any case, I'd love you to meet Jackson, a great friend of mine and a client who has worked with me. He helps businesses scale by focusing on their core numbers and retaining more personal wealth so they're just better at managing money. He runs a group program. He's a JV monster. He's done 2 million in revenue just from joint ventures. Superconnected. He and I share referrals all the time. Love for you guys to have a conversation.

All right, nice to meet you, Jackson, and thank you, Charles. And well, the next step is yours, so I'll definitely get you a booking link and can't wait to go deep with you.

### **Sample Emails:**

**Hi** <> -

Meet David Deutsch.

He's one of the top copywriters in the world who can make you a ton of money.

He's an awesome collaborator - I absolutely love spending time with him and his GIANT brain.

He's a short video I made for you with him:

<https://youtu.be/AsxDhWdm72c>

Here are some examples of businesses David has worked on:

- Info-products (Boardroom classics, Agora, John Assaraf). He's sold millions of dollar\$ in books, newsletters and seminars.
- "Passionate Markets" like Golf, Health, Weight-Loss, Investing. Here's an example sales page: <https://www.powersnapgolf.com/>
- Commodity Products that need differentiation and a certain degree of education to sell and turn on the magic to create the "wow". Ex: P&G/Proctor and Gamble (laundry detergent, diapers, dishwashing detergent),
- Stuff with Environmental "Twists" that need the story or pitch done (he can't share the specific brands due to confidentiality, but think the biggest brands in the world)
- Anything or anyone with an unusual challenge... He's an uncommon thinker.

Perfect-fit businesses:

- Have been in business a while (not starting from scratch)
- Groundwork has been laid, prototyped, done work, some results, can now fix, refine, test and experiment...

Here's his web site: <https://davidldeutsch.com>

Book a time with him: <https://www.calendly.com/daviddeutsch>

Email: [david@dldeutsch.com](mailto:david@dldeutsch.com)

Let me know when you've connected and what happens next.

Mike

Online players

1. What's your offer?
  - Pure JV Traffic System - Get way more clients without wasting money on ad spend. More money. Less Risk. Its the only comprehensive warm traffic and conversion method that installs a plug-n-play JV system into your business that easily ads a million plus annually.

- Who are you looking for? (perfect customer
  - Million dollar plus business looking to diversify with risk free traffic: coaches, consultants, course builders with proven offers looking to systematically scale with endorsed joint venture traffic.
- Email intro Swipe:

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Hey [name]!

How are you?

Meet Charles Byrd. You want to know each other.

He's a values-driven guy like you and a super-connected JV expert.

Here's a quick video intro I made with him:

<https://youtu.be/PgWApSMk1Yc>

He's been helping a lot of my folks diversify their lead sources with endorsed joint ventures.

I'll let you two take it from here to explore possibilities! Happy connecting :-)

Mike

### **Sample Texts:**

1. Text intro (create a swipe)

Hey [name]! How are you?

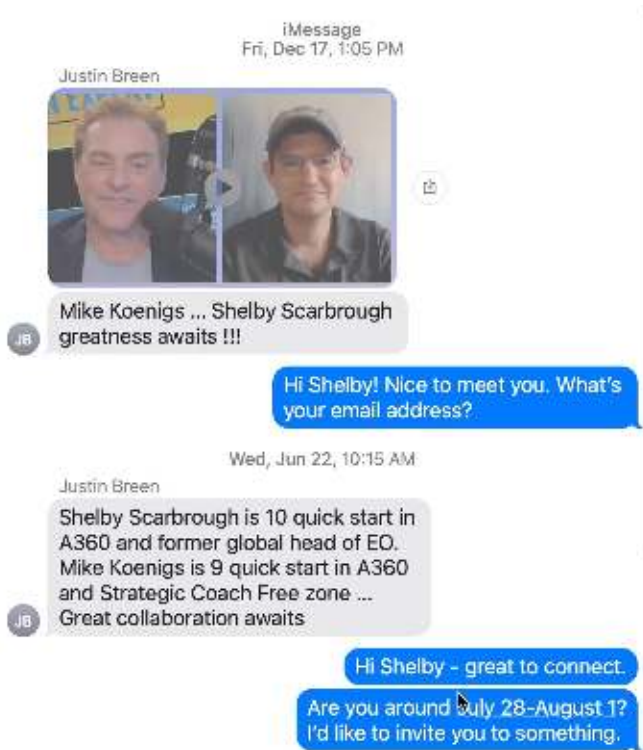
I'd like to introduce you to my good friend Charles Byrd. He has been a key in getting referral and joint venture relationships set up for

I think you two ought to talk. Happy connecting :-)



[your name]

- a.
2. Create the video intro
  - a. ([Mike intro Justin Breen](#))
  - b. ([Justin Breen intro Mike](#))
3. Look through text, email, contact database
4. Start sending...



iMessage  
Mon, Jun 13, 4:35 PM

Justin Breen - meet Kane Minkus.  
You'll love each other and Kane has  
deals for you now.

Tue, Jun 14, 12:15 PM

Justin Breen

Awesome !!! Kane great to connect ...  
here is booking link or let me know what  
works for you !!!

[https://calendly.com/justinbreen/  
connection-call](https://calendly.com/justinbreen/connection-call)

If you've taken Kolbe please send me  
your score ... I'm 8671

JB Also ILL!!! Both Illinois graduates !!

Kane Minkus

Lol I don't know where my Kolbe test  
scores are but I'm a high quick Start I  
remember that :)

KM

Justin Breen

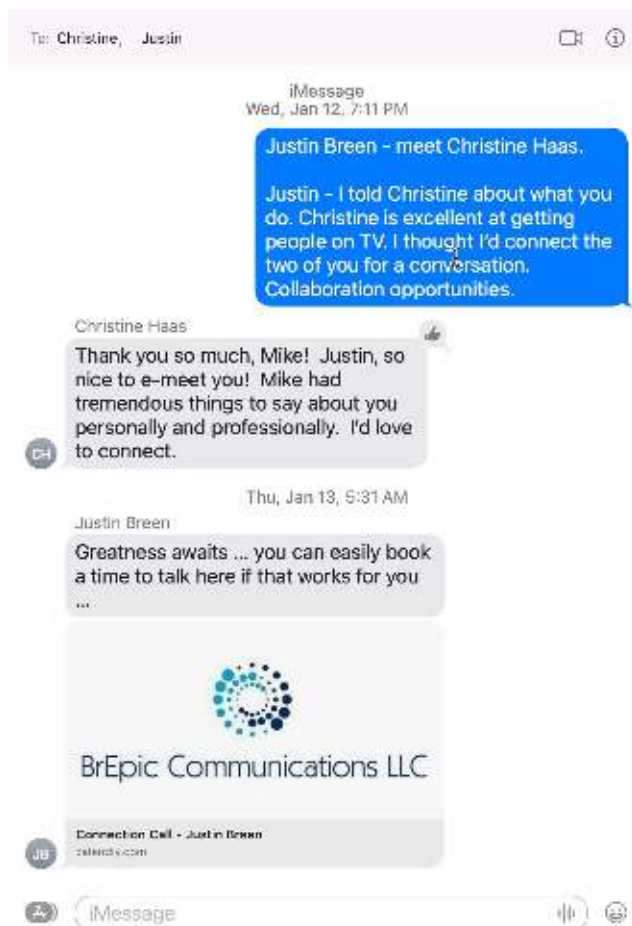
JB

Yep makes sense ... I am high quick  
start and high follow through

Kane Minkus

Nice!

Here's a video on us for some  
background



### Sample Texts:

Shawn - meet Justin Breen.

I just recorded a (really good) podcast interview with him that will be on Capability Amplifier soon BUT I wanted to connect the two of you.

Justin is a media master - he has a really unique and great way to get in the media, get attention, get on TV and craft great stories.

I've already told Justin about you.

You should chat and see if there are some interesting ways to collaborate.

Mike

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### **Mike's Copy**

XXXX meet Mike Koenigs. The best Multiplier I know. You should know him. His email is \_\_\_\_\_ and phone is (XXX) XXX-XXXX

He's helped \_\_\_\_\_.

I'm certain he can help you \_\_\_\_\_.

### **ANOTHER VERSION**

XXXX meet Mike Koenigs.

You should know him. He's a marketing and business genius.

He's built and sold 5 businesses of his own, worked with people like Tony Robbins, Darren Hardy, Brian Tracy, John Assaraf and many other business leaders and founders.

I think he can help you \_\_\_\_\_. [increase your sales, think bigger, create new marketing systems

His email is \_\_\_\_\_ and phone is (XXX) XXX-XXXX

[YOUR NAME]