



The Referral of a Lifetime **The Networking System That Produces Bottom-Line Results Every Day!**

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Authors' Bio: Tm Templeton is an internationally recognized speaker and expert in sales processes, systems, presentation, and productivity. Tim is a senior partner in Always positive, a full-service sales and marketing solutions firm.

Authors' big thought: The author uses an entertaining fictional story to emphasize the importance of "putting the relationship first" - building an ongoing relationship with customers based on genuine respect and caring rather than just making the sale and moving on.

Notes:

Nobody likes cold call. And nobody really needs to make them. In this book you will learn a step-by-step system that will allow you to generate a steady stream of business through consistent referrals from existing customers and friends and, at the same time, maximize business with existing customers.

Your customers and clients already know every new contact you will ever need to succeed. Apply this system and they will naturally refer them to you.

The story begins at California Coffee Café and Bistro in a lovely California Coastal town. The coffee shop is frequented by a number of regulars. The owner clearly knows his customers and who wants a cappuccino-no-whip as well as whose favorite is a fat free decaf latte.

We meet Susie McCumber, the main character of the book. She enters the café, very unhappily. Several months earlier she started a products company. At this point in time she

is depressed as things aren't working as well as she had hoped. Chuck, the owner of the café pulled a biscotti from the big glass jar on the counter, placed it on a paper doily, set the doily on a little plate, and slid the plate right next to her finger tips, bringing them to full rest and prompting Susie's eyes to look up to meet his.

And so Susie's adventure begins. She is introduced by Chuck to David Michael Highground. Mr. Highground, as coach and advisor begins their relationship by asking Susie "*Have you ever heard a pitch that suggests putting the relationship first - making your growth foundation the golden rule?*"

Highground asked Susie three questions:

1. Do you like yourself? *In other words, do you want to become more of yourself and refine the gifts you have been given instead of trying to imitate someone else?*
2. Do you believe in your product? *It can't be only about making money.*
3. Are you willing to stay the course? *Everyone is different so the system applies differently to each. The one key though, that everyone must have is what is called 'demonstrated consistency.'*

These reflective questions are the starting point for deploying the system.

Through Highground's method you will see results immediately, but the real lasting effects, the kind on which you can build your business and life, happens only when you adapt this marketing system on a daily basis for about four months. Then it continues to build and deepen each month thereafter.

In his introduction, Highground explained to Susie that no matter how great his business concepts might be, the relationship he has with Chuck is much more precious than any service or program. So he would honor his relationship with Chuck by helping Susie. *In other words, he wants to serve her well because of his relationship with Chuck.*

Highground introduces Susie to 4 people each of whom has a different interpersonal style. Each of them teaches Susie a principle of business. Susie reflects on her own personal style, creates goals and is totally energized to create the business she dreams of. The story closes after fast-forwarding a few months. Susie now meets at the coffee shop with her team of 5 employees and is on her journey to success.

HIGHGROUND'S PRINCIPLES OF BUSINESS

These are the four foundational principles of the system. To find out more, read chapters 3, 4, 5, and 6.

PRINCIPLE 1. The 250 by 250 Rule. It's not only who you know that counts, it's who your clients know that is important. Make a list of the 250 people you know. They each know 250 as well. If you ask the right questions this gives a potential of 62,500 people to

connect with.

PRINCIPLE 2: Build a database and ABC it

PRINCIPLE 3: Just Let Me Know. Educate your clients about how you work and your value to them through regular, tangible actions performed without fail.

PRINCIPLE 4. Keep in touch, consistently, personally and systematically.

HIGHGROUND'S PRINCIPLES GOALS

These goal sheets can be used to plan your personal program. To view completed goals, return to pages 54, 56, 76-77, and 98.

Goal 1: Finish my 250 by 250 list and then organize the names. Begin to put my new mind-set into action.

Goal 2: Have my 250 by 250 database ABC-ed and in use.

Goal 3: Professionally brand this system with my own style, then begin a proactive program to use in all that I say and do with all those I know.

Goal 4: Have in place the next twelve months of my Keep in Touch and Web of Appreciation Programs

For each goal answer the following:

Goal Date:

The date is _____ and I have:

I have already experienced:

I feel:

I am excited about:

My associates and colleagues are:

I am determined to:

THREE MAGIC QUESTIONS FOR NEW CONTACTS

These simple questions will help engage you immediately with new people you meet. To find out more, read chapter 3.

What is it you do?

What is it you like most about that?

If you could start all over, knowing what you now know, what would your day look like?

Bonus follow-up statement to use whenever you choose: "Tell me more."

THE FOUR BUSINESS PERSONALITY WINDOWS

The four personality types are expressed in two words. The first word, on the left of the hyphen, represents how people see you and who you are naturally. The word on the right of the hyphen represents your natural tendency in business relationships.

Relational-Relational
Relational-Business

Business-Relational
Business-Business

Relational-Relational

The relational-relational person is one who thinks of relationships with others- how to help them and how to be liked or even loved. Those people rarely think of the business ramifications of their actions, or if they do, they will justify them in some relational way. So the second word has to be "relational" too.

Relational-Business

When meeting people, the relational-business person is truly interested in the relationship, but when the talk turns to business, this person will begin to think strategically.

Business-Relational

The business relational person doesn't seem at first glance as interested in the relationship as much as in pure business, but this person will develop deep relationships after the business is established.

Business-Business

This trait is simply the opposite of relational-relational. Business-business people normally have a hard time with relational principles and the concepts of this system until they justify in some purely business way the time spent with those they've affected - which they always do.

HIGHGROUND'S NEXT TWENTY STEPS

This list of next steps can be used as a checklist to implement your personal system.

1. Finish the list of 250 names. Call and verify addresses, telephone numbers, and e-mail addresses.
2. ABC all names.
3. Select a contact manager or CRM system. Make sure you have the ability to set ABC fields.
4. Research and select a trusted contact database professional with mail and print service.
5. Research the internet for different communications you can develop for your Keep in Touch program. Check with those in your industry to see what they use. Outline a twelve month program.
6. Select an on-line service to help you develop and deliver an immediate Web of Appreciation. Make sure you can access your database for ease of use with standard selections that can be processed without difficulty.

7. Purchase personalized thank-you notes. Immediately send them after every meeting upon gaining permission to add the person to your database.
8. Finalize a twelve-month Keep in Touch print program for your database. (There is an example in the book on page 126). Select the items and choose the dates when you will send them. Commit the plan to paper and make it visible. List the program tasks needed each month to deliver without fail.
9. Finalize a Web of Appreciation program. (There is an example on page 127). Set an appropriate budget for frontline personnel, referral gifts, and standard holiday gifts in addition to your Keep in Touch program.
10. Send a confession letter to your database. (There is an example in the book on page 117).
11. Follow up by calling everyone you sent a letter to. Ask for birthdays (not years) and anniversaries if appropriate. Enter them into your database.
12. Set personal meetings with your 'A's and explain your new philosophy. *Ask for referrals during the meeting.*
13. If needed, make a commitment to a set number of personal appointments or telephone calls to add more potential clients to your database. Utilize the three magic questions
14. If you want a larger sphere of influence, adopt a database. Call everyone on your newly adopted list and ask permission to start communicating
15. If you want a larger sphere of influence, select a direct mail list. Customize the list and call each person using the following qualifying question to build a relational farm: *"If any of your friends or relatives were interested in____, do you have a good____ you would refer them to?"*
16. Educate everyone on your staff about how the program works. Incorporate the principles into your culture.
17. Call all the people who "make money when you make money"-primarily your vendors. Explain how your program works, ask what you can do for them, and then *ask for referrals.*
18. Incorporate into your sales presentation how you put relationships first and what the value is to your clients. Share your new philosophy with everyone appropriate who will listen. Then *ask for referrals.*
19. Use your newfound 'hall pass' and make a scheduled call to everyone in your database at least once a year. If you have developed a birthday card program, make the call after you have sent out the birthday card, calling to say "happy birthday." Ask how you might help the person and ask for a referral or an appointment if appropriate.
20. Always, always ask what you might do for the person you call and always, always remind the person that your business is built on the good opinion of others. Then always ask *for a referral.*

Recommendation: This straightforward and powerful book will ultimately change the way you look at all the relationships in your life. As soon as I finished reading it, I started working on the system for increasing my own business success and telling my colleagues about the book. My book notes are meant to whet your appetite - this book is worth buying. Keep-In Touch software was written to keep track of referrals and contacts. You can find out more about that by visiting www.keep-intouch.com



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My associates and I specialize in and have a passion for working with successful accounting firms. Our concentration is on what are commonly called the "soft skills." Through our experience we have demonstrated that what is true for Fortune 500 companies is also true in creating a competitive advantage for accounting firms.

We specialize in working with those firms who want a competitive advantage in recruiting prime talent, retaining their key employees and developing their partners, managers and staff. Frumi & Associates provides a formal measurable coaching program to address the specialized needs of growing firms.

Unlike other coaching firms our associates all have an intimate knowledge of the accounting profession and the challenges they face.