

Strengthening and Supporting Our Referral Partners



“To go fast, go alone. To go far, go together.” African Proverb

Vision Statement

“World Abundance through Business Re-education.”

Benefits to my Referral Partners for Referring

- ✓ Invitations to our social events with current and past clients
- ✓ Enhance exposure (cross promote via presentations, spotlighting, etc)
- ✓ Introductions to clients as added value by using you as a resource
- ✓ Invitation to monthly trainings at no cost or at a discount
- ✓ Regular meetings to uncover additional ways to refer to you
- ✓ Sharing your social media posts and events
- ✓ Exposure to our deep networks and relationships providing valuable resources
- ✓ Invitations to networking and special events in the community

5 Criteria for being a Great Referral Partner:

- ✓ Want OR can be inspired to help ActionCOACH Tampa Bay
- ✓ Have the time OR are willing to make the time to help ActionCOACH Tampa Bay
- ✓ Have the ability now OR is willing to be trained to identify and execute referrals on ActionCOACH Tampa Bay's behalf
- ✓ Have the resources necessary to help ActionCOACH Tampa Bay
- ✓ Have credible relationships with the types of people ActionCOACH Tampa Bay wants to target

About ActionCOACH Tampa Bay:

Work directly with the business owner to help them build profit and freedom by building a saleable business that works without them. They can finally be the owner of their business rather than the employee operator. Only 15% of businesses listed ever sell which means 85% don't sell. The reason being the owners are trying to sell their job not a business.

Coaching is a practice of **Knowledge** (learning what you don't know you don't know) + **Planning** (turning problems into solutions) x **Action** (staying focused and achieving the next level) = **Success** (profit and free time)

Some of the potential benefits to the client:

Sales & Marketing Benefits

- ✓ Create a turn-key persuasive and inexpensive ways to generate more leads and prospects.
- ✓ A step-by-step marketing plan that significantly increases your new customers, revenues, profits without taking all your energy away from the day-to-day business.
- ✓ Creating customer focused advertising and online marketing strategies to draw willing buyers to your business every week.
- ✓ The most effective sales appeal for your products and services that uniquely sets your business head & shoulders above the competition.
- ✓ To build a more motivated, professional and profitable sales or telemarketing force that creates a far stronger sales conversion and average dollar sale.
- ✓ Having a strategy that will compel your former and even inactive customers to come back and buy from you again and again.
- ✓ Boosting the average \$ sale value and creating a far better sales result from every customer you are already doing business with right now.
- ✓ Introducing new and more profitable product lines or services to both win new customers and extend the value you provide to existing ones.

Team Building & Leadership

- ✓ Helping you develop and build strong leadership skills and attributes so you can, not just manage, but truly lead your people and your company.
- ✓ To help you find or re-find your passion and get your heart and mind back focused on enjoying running and building the business again.
- ✓ Using a recruiting system that is both efficient and effective to help you add the right, motivated, great people to your team.
- ✓ Developing an ongoing training system so people are more effective and more productive at their jobs, and, some are ready for promotion as the company grows
- ✓ Training your team so they deliver superior levels of customer service and create raving fans and repeat buyers time after time.
- ✓ Helping you and your team get better use of your time and stop working reactively, putting out fires, and become more pro-active about building the company.
- ✓ Developing a clear and powerful set of both personal and business goals and having a vision for your company.

Running Your Business

- ✓ To get yourself the freedom of more time away from the business, still knowing it is growing and creating more, and more, profits without you there.
- ✓ To help you understand how to re-invest your profits back into the business or how to take profits and invest them for passive income outside of your business.
- ✓ Getting a solid business plan of action so you and your team are focused on doing what matters, what's important and what will get the biggest results.
- ✓ To get the business and your people to a stage where they can run it profitably so you can take more time out each week and vacations each year.
- ✓ Developing a straightforward succession plan so you can replace yourself with the right people, at the right time and allow them to run it without you.
- ✓ Understanding how you could expand the operation to multiple outlets or multiple territories so you can take advantage of an already solid and profitable business model.
- ✓ Understand the options for creating a franchise system that both sells and creates profitable franchisees who can afford to pay you serious royalties.
- ✓ Assistance with taking the company international, if desired to profit from global markets, global costs and global currency values.

Systems

- ✓ Having a system for controlling, managing and reporting the company finances so you can know you're building real profits.
- ✓ Working 'ON' your business rather than 'IN' it and create a systems dependent company rather than a people dependent one.
- ✓ Developing an organizational chart and position descriptions and getting the company administration handled.
- ✓ Building consistency of delivery into your products/services giving better levels of service and more rewarding customer experiences.

Coaching

- ✓ Having a HOTLINE to a great coach who can help you stay focused, answer your most important business questions and help you grow the business.

What is the Target Market for ActionCOACH Tampa Bay?

- ✓ Business owner who still works in the daily operations of the business.
- ✓ Owners who have been in business 3+ years and are just under \$1 Million up to ~\$15 Million in gross revenue (min \$500-750K in some industries).
 - Attorney Firms
 - Trades (Plumber, Electrician, Landscaper, Roofer, General Contractor)
 - Cash-based Health Care (Dermatologist, Psychologist, Specialized Surgeon, Concierge Physicians Oral surgeons, Endodontists, Plastic Surgeons)
- ✓ Business owners that have a vision for growing their business into an asset to be a vehicle for retirement or expanding the business.
- ✓ Business owners that are successful, profitable, and have a great reputation for the type of work they do.

Note: We've served over 70 different industry types locally in Tampa Bay

Phrases to Listen for / Things to Look for?

- ✓ Working too many hours
- ✓ I just can't get good help
- ✓ I'm doing everything in the business
- ✓ I know I need systems and employee handbooks but I don't know where to start
- ✓ Owner still working in the day-to-day of the business
- ✓ I'm busy but I'm just not making the profits I want
- ✓ I'm growing but I want to grow the right way
- ✓ I have a concept that I want to replicate or franchise
- ✓ I need to do something but I'm just so busy
- ✓ I haven't taken time off in years
- ✓ I'm wanting to retire in 2-5 years and don't know where to start
- ✓ I want to take the business to the next level without working more hours
- ✓ I'm investing in fleets, expanded office, equipment
- ✓ I'm making investments in marketing and don't know if I'm getting a return
- ✓ I have a family business without a succession plan in place for retirement

How to qualify the referral?

- Are you still working in the day-to-day of your business?
- Do you view your business as an important part of funding your retirement?
- Would you like to have more time to work on what you really enjoy doing?

Conversation starters:

- What's your plan for exiting your business or retirement?
- When are you planning to retire?
- What will you do with your business when you retire?
- How long are you going to work?
- 100% of all business owners will leave at some point, what is your business planned exit date?
- Who do you go to for professional advice to make business decisions?
- How do you make financial decisions around growth?
- How often do you refer to your written goals and strategic plan?
- Are you wanting to grow your business?
- Do you have some challenges related to growing?
- Would you be open to talking to an advisor that successfully creates growth in businesses?

How to promote ActionCOACH Tampa Bay

- I want to introduce you to an expert that helps business owners create a saleable business that works without the owner so you can have the freedom and profit you originally went into business to achieve. Would you like me to introduce you to them by email or would you prefer I help set up a meeting?

What does the first appointment look like?

The client will receive a response same day from us to learn more about their business. If the referral has not been qualified, a call will be scheduled to learn more about their business and their goals. If you have already qualified the referral, we will schedule a complimentary coaching session and send them 3 videos and a checklist. The videos will cover the 5 Ways to boosting cash flow, 6 Steps to building a business that works without the owner, and Client testimonials. The checklist allows them to select the top 3-5 challenges they are focused on right now so we can discuss at least one in the complimentary coaching session.

Methods to Create Referrals:

1. Invite 5 people from your LinkedIn, Next-door, Facebook, Email database, Phone/Text database to our (monthly) 5 Ways to Boost Cash Flow webinar
2. Review each other's upcoming calendar to find opportunities to promote each other in upcoming meetings by role playing questions to ask.
3. Review a list of targeted names for contacts you know and could make an introduction.

16 Ways to Build Our Relationship and Add Value to Each Other:

1. *Advice Seeking/Advising*
 - a. Give free advice on limited basis to each other and contacts as introduction
2. *Purchasing*
 - a. Buy from each other
3. *Inviting from our individual data bases*
 - a. Attend networking or community events together
 - b. Attend Trainings
 - c. Co-host activities
4. *Recognizing*
 - a. Public forums
 - b. Nominate one another for awards
 - c. Complete on-line reviews
5. *Collaborating*
 - a. Charity or Events
 - b. Marketing Efforts
 - c. Speaking Events
 - d. Attend events together to cross promote each other
6. *Sponsor (jointly perhaps)*
 - a. Charity or Events
 - b. Lunch or Breakfast with potential referrals
 - c. Location for networking or education
 - d. Sports or Other Types of Teams / Community events
 - e. Speaking opportunities

7. *Promoting*
 - a. Learn a story to tell to targeted contacts
 - b. Bring up conversation starters in meetings
 - c. Comment and Share on Facebook posts
 - d. Facebook live interviews
8. *Display/Distribute information or products for one another*
 - a. List as a Preferred vendor on website
 - b. Newsletter spotlight
 - c. Cards in office/business
 - d. Contact information in email signature
9. *Collect and provide testimonials*
 - a. Online testimonials – LinkedIn, Facebook, Google
 - b. Share experience with product service used
 - c. Video testimonials
10. *Give referrals/leads if acceptable*
 - a. Contact sphere of influence referrals
 - b. Association referrals
 - c. Target client referrals
11. *Connecting/Introducing*
 - a. Virtual email introductions
 - b. Invite potential connection to meetings/events
12. *Publish Articles*
 - a. Press releases
 - b. Blog
 - c. Video
13. *Horn Tooting*
 - a. “Sentence and a half” answer to “How are you doing?”
 - b. Great because launching...
 - c. Just stated working with...
 - d. Celebrating success...
14. *Volunteer*
 - a. Give back by donating time or money to causes that one another support
15. *Nominate*
 - a. Awards
 - b. Membership groups
 - c. News outlets
 - d. Speaking opportunities
16. *Announcing*
 - a. New team members
 - b. Expansion or Moving
 - c. New products/services

Best Way to Introduce Scripts:

I'm writing to virtually introduce the two of you!



<referral name> : <insert coach name> is a Business Coach at the local business coaching firm, ActionCOACH Tampa Bay. He/she has a track-record of successfully helping business owners maximize their profit and time so that they have a valuable asset when they go to sell or transition their business. I'm introducing you to <insert coach name> so you can at least meet by phone to learn more about each other to see if you'd be a good fit for a complimentary strategy session in the future.

<insert coach name>: <Referral Name> is the owner of <Company> and has been extremely successful and continues to grow. I thought they might really benefit from having the opportunity to speak with you as they continue to look for ways to maximize their time and profits. In particular what I liked most was your proven system for growing profit with relatively small changes over time and the model (with local examples) for creating a business that could work without the owner.

Thank you and happy connecting!

#2 Referral Partner Target: Business Brokers

How to refer you:

I want to introduce you to an expert that does just what you're talking about. Would you like me to introduce you to her by email or would you prefer I help set up a meeting?

Email introduction script:

Hello <name> and <name>!

I'm writing to virtually introduce the two of you!

<referral name> : <insert coach name> is a Partner of ActionCOACH Tampa. He/she has had a track-record of successfully helping business owners maximize their profit and time so that they have a valuable asset when they go to sell or transition their business. I'm introducing you to <insert coach name> so you can at least meet by phone to learn more about each other to see if you'd be a good fit for working together with businesses preparing for sale.

<insert coach name>: <Referral Name> is an extremely successful business broker known for successfully taking business owners through the selling process. I thought they might really benefit from having the opportunity to speak with you as they continue to look for ways to get business owners ready for sale but don't have the bandwidth to coach them. In particular what I liked most was your proven system for growing profit with relatively small changes over time and the model (with local examples) for creating a business that could work without the owner.

Thank you and happy connecting!

Hello <insert coach name> and <>



I'm writing to virtually introduce the two of you!

<> : I recently had a meeting with <insert coach name>. <insert coach name> works with owners of successful businesses that are steadily growing and have a vision for even greater results in the future. I'm introducing you to <insert coach name> because I've been impressed with your level of professionalism and the successful business you have built. I would suggest getting together for a face to face meeting or at least a phone call to learn more about each other to see if you'd be a good fit for <insert coach name>'s services.

<insert coach name>: <> is the owner of an <> company and has been extremely successful and continues to grow. I thought they might really benefit from having the opportunity to learn more about your services as they continue to look for ways to maximize their time and profits. In particular what I liked most was the proven systems you shared for growing profit with relatively small changes over time and the model for creating a business that could work without the owner.

Thank you and happy connecting!

List of Desired Speaking Engagements

Companies

- HR directors and Business Owners with 10+ employees

Chamber of Commerce

- Tampa Bay Area or further if on Zoom

Professional Associations & Organizations

- Trade Associations
- Bar and Attorney Chapters
- Healthcare Associations – Dentist, Physicians, Vets, Pharmacists

Email for Speaker Engagement:

Email/letter intro

Dear ____

I recently had the opportunity to hear an amazing speaker that I think would be PERFECT for your group. ActionCOACH has been sharing business coaching knowledge for the past decade, and with their published book, OMG! What's the Focus? have helped hundreds of businesses become experts in every area of their business.

Their speaker presentation will be based off of the principles that have helped business globally in over 88 countries for over 2 decades!

Because you are interested, I would be happy to connect you to ActionCOACH Tampa Bay, as they are great in helping the audience make more money and save time.

I look forward to hearing from you soon,
Your name

Strategic Referral Partners

- HR Outsourcing
- CPA work in the business
- Business Broker

Social Media

“Subscribe” to and recommend our Channel on YouTube:

<https://www.youtube.com/channel/UCPiCX1j1rPMnvpipE0xSBQA>

“Like” Page on Facebook: <https://www.facebook.com/tampabaybusinesscoaches>

“Follow” Page on LinkedIn: <http://www.linkedin.com/company/actioncoach-tampa-bay>

Testimonial

Google Reviews

Video on YouTube

Success Stories on Website

Pro-bono Sessions to include:

- 5 Ways to Boost Cash Flow – Monthly Webinar
- Monthly Training Webinars
- One hour Pro-Bono Strategy Session – meet with a coach for up to 60 minutes to overcome your top challenge that is holding you back from growth in your business.

Identifying

- 1.
- 2.
- 3.
- 4.
- 5.

Next Steps: