Making the Most of Referral Groups

How coaches can make better use of referral networking groups like BNI

Laura Lee Rose
This is Laura Lee Rose. I am a business and efficiency coach. I help people who want to take their professional development to the next level in the corporate environment and others that want to take that big leap into entrepreneurship. Over the past several months, I have freely shared my social media and networking tips in a few quick videos. I’ve developed and spoken a SNAP (Social Networking Assistant Process) system entrepreneurs and coaches. I designed a 3-day tele-seminar (Light Your Fuse) for coaches to speak and expose their products and services to a different set of clients. Since then I have received several follow-up questions about how coaches can:

1. How to get coaching to pay
2. How coaches can best leverage and productize their coaching and consultant services.
3. How to best market and price their coaching services
4. How to get the BNI (Business Network International) and similar referral systems to work for them.
5. How to use social media to get the proper exposure
6. How to effectively convert leads to sales
7. How to convert coaching services to salable products
8. How to leverage their current network to go beyond their current reach
9. How to handle discounts requests in a professional manner
10. How to find time to do the necessary networking

Today's discussion is “How to make better use of referral and business networking groups”
Regardless of the type or title of your referral and networking meetings, there are a few things that you can do to increase your success and profitability.

I am a business and efficiency coach and I have attended several different types of networking meetings and catalysts events. Many of them were disappointing, but still a learning experience.

The first thing you need to acknowledge is your purpose or reason for attending these meetings. Regardless of how nice the participants are; if they are not going to give you money-making referrals, you are wasting your time.

I have been a member of BNI for 2 years. I was their regional time management trainer, providing monthly presentation on how to find time to network. I also was my chapter’s Secretary and Treasurer. I will be sharing my experiences in the next few minutes.
As a coach, I experienced several of these same concerns. But then I designed a way to better use these networking events to my advantage. This ebook covers many of my tips.

Identify your specific goals for your referral meetings.

- What do you expect to get out of each meeting?
- What are some of your accomplishments that tie directly to these people’s business and clients?
- What are some of the your interests that help you connect with these people and their clients?
- What type of referrals and networks can you share with these people that will benefit both you and them?
- Which skills do you need to illustrate to attract the right people and their clients?
- What do you want to walk out of this meeting with?
- Who, What, Where, When and How did you get your last 10 clients? What do you need to do to duplicate those results within this group?

If you don’t know what you want, you can not effectively ask for it. And if you are not asking for it, how can others supply it to you?
First suggestion is to take advantage of any and all the training your particular referral group offers. BNI is just one example. It provides training on your 30-45 second commercials, your speaker sessions, and your one-on-one meetings.

These tips are very good and valid. But as coaches, we need to take all these things a step further because our industry is a little different than selling insurance or showing houses. Because coaching isn’t as tangible as legal services or banking services, we need to approach referrals a little be differently
Many coaches simply write-off referral groups as BNI – because they are not initially getting the results that they want. It takes time, energy, and focus to build relationships in any networking and referral group. People do business with people they know, like and trust. And trust is not any overnight accomplishment.

Coaching is not much different. Coaches enter a referral group like BNI, Coffee and Contacts, or Power Core. They witness several referrals going back and forth. And they surely expect to get the same amount of referrals that others seem to be getting. Because they don’t, they often through out the baby with the bathwater (meaning they decide that the referral groups are not working for them).

It might well be the wrong tool for them. But it also may be that you need to use the tool a little differently than the rest of the group.
Referral groups like BNI and PowerCore are somewhat costly. But each chapter allows only one Member in each classification so there aren’t any conflicts. The concept is that when anyone in the group comes across the need for a coach; they send the client to you.

- But just because the coach seat is still vacant is not a good enough reason to join the group.
- Just because your feel comfortable with the group and they are fun loving is not a good enough reason to join the group.
- Just because you see referrals flying to and fro is not a good enough reason to join the group.

There’s one piece of information that you need to consider.
An important concept to understand is the Contact Sphere.

Contact Sphere: a group of classifications who have clients in common, or whose clients have a need for many of them at the same time. The four most common Contact Spheres are Business Services, Financial Services, Personal Services and Residential Real Estate. The following slide illustrates the typical contact spheres and the specific classifications under each sphere.

Take the time to locate your contact sphere within the chapter or group. If you are the only category in your contact sphere, chances are that you will not be getting referrals from the other power team members. They are passing referrals to each other because it is easy to do so. Their clients naturally need and are already looking for those other services. Realistically, the team members that do not share your contact sphere will not go out of their way to promote or educate their clients on your behalf. So find a group that already have members in your contact sphere or power group.
If you are the only one in your contact sphere, the BNI or referral group will try to encourage you to bring in other new members into the group. This is great for your referral group but it’s a lot of work for you. And in the meantime, you will not be getting any referrals from the current team. If you are going to do all that work to create your own contact sphere team – you might as well separate from this team and start one on your own.

Take a moment to identify your contact sphere (businesses or professions that naturally provide a source of referrals for you.)
Once you have joined a group with the proper contact sphere to help you along your way, you need to create a target and specific referral requests.

Coaches often focus on too wide a net. They feel they can help everyone, just like a dentist can help anyone with teeth. But, as you have learned in previous marketing classes, you really do need to narrow your niche. If you are too general in your referral requests, you run the risk of receiving the wrong type of referrals (which costs you time and frustration) or no referrals at all.

Since coaching is a difficult industry to explain, include different success stories in your commercials. Make the stories interesting because (in reality) most people are not listening to your commercial. They are either practicing their speech or daydreaming about something else. Mix it up and surprise them to retrieve their attention.

Break your business/profession down to its critical parts (specific products or services, selected “target markets” or clients, particular benefits, etc.) Include the supporting materials (brochures, letters, references, samples, pictures, discounts, etc…) that will support each critical part.

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The 45 seconds does not really build the relationship and trust with your team. As mentioned earlier, it takes time for people to know, like and trust you. And 45 seconds ain’t going to do it.

Make full use of your one-on-one meetings. Offer free introductory sessions so that they can experience what you do. Don’t limit your one-on-one meetings to your referral group. Visit other BNI chapters and referral groups. Whenever you come across others in your contact sphere, setup one-on-one meetings with them as well. They don’t have to be in your specific BNI or referral group.

I have a ebook on how to best conduct a coaching one-on-one meeting to improve your referrals and profitability. Contact LauraRose@RoseCoaching.info for more information on that ebook.
Most referral networking groups will give you an opportunity to speak for an extended period at least once every couple of months. Even so you will have at most only 10 minutes. You need to make the most of it. Therefore, don’t spend your time explaining what coaching is all about or what you do for people. After all, you have been spending every week and every one-on-one doing the above. So, by the time you have your speaker day, they should all be up to speed.

After a short introduction, go directly into describing what they can be doing for you. Describe your target clients, specific job titles, companies or organizations that you want to get into, etc.

Ask them to actually write the names of the people they know that fit. And then setup follow-up one-on-one meetings with those people BEFORE you leave the meeting. You need to follow-up on those leads and referrals as soon as possible.
Because your contact sphere are in a better position to give your meaning and profitable referrals; it’s logical that you should spend more time and attention on them. Unfortunately, most networkers do not do this. They spend time with people they enjoy. Or they spend time with people they see giving lots of referrals to other people. Once again, even though they are providing referrals to other people doesn’t mean that their client base is right for your business.

Prioritize your one-on-one meetings with those in your contact sphere. For instance you might want to meet people of your contact sphere twice a much as you meet with other. An easy way to do this is to create and facilitate a contact sphere group meeting. Use this time to coach them on how to better provide you with leads; and listen on how you can do the same for them.

Take it a step further and generate collaborative events among your sphere to generate new referrals for everyone in your circle.

**Use hind-sight to your advantage.** Who, What, Where, When and How did you attract your last 10 clients? Use that information to design your contact sphere and high-profile referral avenues.
Actions speak louder than words. Illustrate your coaching methods and leadership style by actually volunteering within your group. You can volunteer in any number of roles. But make sure you keep metrics to illustrate the positive change that your involvement generated. For instance, if you are the membership coordinator – illustrate a % growth that your term of office accomplished.

As an officer, you receive certain perks, you have more exposure than the regular members, and you have more opportunities to network with other BNI Leaders and officers.

As a coach, I also took volunteering to the next step. Since I am a business and efficiency coach
As a coach, you should also be creating your own opportunities within your referral group. Since I am a business and efficiency coach specialized in time management training, I noticed that BNI did not have any training on how to find time to do all the things they suggest in their other training. So, I created a presentation on “How to find time to network” and tied all their BNI training points with time management tips. I then made a proposal to the BNI Director and offered to conduct this training for the triangle BNI region.

As a regional training, I had BNI members of various chapters in my classes. As part of my classes, I offered my slide deck to those that provided me with their business cards and contact information. I offered introductory coaching sessions to these cross-chapter members/students. This was another way to increase my contacts and customer database file.

In my “How to get Coaching to Pay Off” ebook, I share other ways to expand your exposure.
Lots of time

- Making BNI profitable for coaching takes a lot of time.
- It’s not as easy as some of the other businesses.
- Can be effective if you use it creatively.

Any networking referral group takes time. Making it profitable for coaching may be a little more challenging, but it can be effective if you use it correctly.
I realize that I went through this very quickly. We covered lots of information and tips in a very short amount of time.

I have more detailed workshops on how to better use Social Media, Branding, 52 Week Topic Worksheets, Campaign planning, etc.

I also have a set of e-books especially for coaches and entrepreneur. The ebook series contain information on:

- Client Attraction marketing plans
- Client Experience Flowcharts
- How to use the coaching product funnel
- Finding time to network
- Getting Coaching to pay off
- How coaches can make better use of BNI
- How coaches can make better use of one-on-one sales meetings
- Leveraging Links
- Pricing coaching products and services

Contact LauraRose@RoseCoaching.info for more information to get the entire set for a discount price.