Private Practice Marketing Secrets Mentoring Program

Module Five Transcript

Relationship Building: Leveraging Your Strengths to Create an Endless Stream of Referrals

David Steele: Welcome to your Private Practice Marketing Secrets Mentoring Program. This is Module Five. We are going to cover relationship building, leveraging your strengths to create an endless stream of referrals.

This is very exciting because by far, private practice professionals get clients most effectively through word of mouth referral. By far. This is a well researched fact.

It's very, very traditional, and it's very powerful, even in today's world of the Internet, that this is a very personal intimate service. People need to know us, like us, and trust us to hire us and pay us money and allow themselves to be vulnerable in working with us, be supportable to us. It really takes a high trust factor and when people refer to you, they are much more likely to trust you and much more likely to hire you when it's from a referral.

This is exciting because today's module is very, very important. It is probably where you're going to get most of your clients. If you do nothing else, no website, no business card, no gem, no brochure, no presentations. If you do nothing else, the material from this module can grow your practice and fill it. Not just today and tomorrow, but forever.

Because referral sources are gold. If you take good care of them, they will continue to send you referrals, and every new referral source that you meet and develop will send you referrals. It will get to the point, after a few years, that you couldn't stop it if you wanted to.

So, this is great, and let's talk today about how exactly to do that.

I have a four step action plan for you today. This is on page one. What I'd like you to do as a result of this module is to choose three traditional strategies for getting your name in front of referral sources. This is tried and true. It works. Has worked for decades and generations. They are very, very traditional.

Step two is choose three non-traditional for getting your name in front of referral sources. These are things that are more cutting edge. Things that are more creative and based on technology. Things that your average practitioner might not think of doing, but since you are here in Private Practice Marketing Secrets, we'll let you in on these creative strategies.

Step three: Create and implement your plan for using these strategies. When you get off the call today, between now and Friday what I want you to do is, after taking in all the information, all the ideas, all the strategies that are possible, I want you to create your own strategy for your practice of what you will do, how you will do it, and when you will do it. So, create and implement your plan for using these strategies.

Then step four: Follow up and keep your name in front of your referral sources. Following up is very, very important. The most exciting, freeing aspect of all this is that you do not have to helplessly sit by your phone waiting for it to ring. You can contact people, build relationships with people and create pipelines that bring referrals your way. So, follow up and keep your name in front of referral sources. That's step four.

Turning the page to page two of your study guide. In today's module, you will learn traditional strategies for getting your name in front of referral sources, non-traditional strategies for getting your name in front of referral sources, how to keep your name in front of referral sources with strategic follow up, how to create your champions, and a lot more.

So, section one. How to get your name in front of referral sources. The traditional strategies. There are five of them.

The first one is a tricky one. It's to passively hope. This is what most private practice professionals do. They passively hope that they will get a referral. They dance when it happens, and they moan and whine when it doesn't happen. And they see all sorts of empty slots in their schedule. They feel quite helpless in doing anything about it. This is the everyday reality for most of the folks in private practice that are not here in private practice marking secrets, so this will not be you.

Strategy number two is send a letter. Identify referral sources that are a good fit for you and send them a letter. Strategy three, send them an email. Strategy four, call them on the phone. Strategy five, connect with them in person. These are very traditional strategies; these are very easy to do.

What they all have in common is that you are targeting potential referral sources. And, we'll talk about how to do that and who to do that with, but basically those are the traditional strategies. These work, by the way, there is nothing wrong with them. Don't look at them and say "Oh, that's boring. Oh, I don't want to do that." Well, it works, it's effective, and you need to do them, you need to do all of them.

Send letters and follow up by email, or send an email and follow up with a letter. Call on the telephone; send an email letting them know you're going to call on the telephone. Then send an email after you've called them on the telephone and left a message and say "Hey, I called you and left a message and I was wondering if you'd like to chat."

A lot of private practice professionals work with their clients in person. In today's world, that is not always necessary, a lot of practitioners have the goal of developing a telephone consultation practice. Well, that's great but still even if you serve people over the phone, the building relationships and referral sources is best done in person.

There is absolutely nothing wrong with dropping by somebody's office, and saying hello. In the old days this was normal, you know, the neighborly thing to do. And yes, in today's world, we have cell phones and instant messaging and email and this has dropped by the wayside. You can differentiate yourself as the person that provides the personal touch. People like that, people love that nowadays when they get the personal touch.

This is a relationship business. I'm not talking about you being a relationship coach; I'm not assuming you're a relationship coach. If you are a private practice professional of any kind, and I mean even people like service professionals, like lawyers and accountants, doctors, physicians, chiropractors, consultants. We are all in the relationship business because what we do with our client involves a relationship with our client. The client will not want to hire us and will not benefit from working with us if we don't have a positive relationship.

So, we tend to be relationship oriented in our work. We tend to want to help people, connect with people, and be of service, you know, we tend to like people. You know, I do know some practitioners that don't like people and I wonder, well, why the heck you are in this field, why do you have this profession?

But most of us like people, and so this is a relationship business that you are in and it is our strength to connect with people and be of service to them. It's an absolute strength and that is what's needed to build referral relationships. So you are leveraging your strengths to create an effortless stream of referrals. And, how you do that, it can be as simple as sending letters, emails, calling on the phone, showing up in person.

This is relationship stuff, and I encourage you when you're doing this, and you probably already do this, but it bears repeating, I've just got to say it. To think of everybody that you contact, whether it's by phone or email or sending a letter, as an individual person, before you call somebody on the phone, envision them in your mind.

Think of them for who they are as a very real person that you want to connect with. Don't objectify them in terms of: Well, here's a referral source and I have a goal of getting a client from them, so I hope they say yes and I'm going to call with that goal in mind. No, they're not a faceless referral source who are there to do your bidding, they are a real person.

Same thing when you are contacting prospects, by email or by telephone or sending them a letter. Think of them as real people. When you work with your clients, you connect with them as real people. Same thing when you are corresponding, communicating with any of your business contacts, including your referral sources.

The little trick to doing that is, even if they're not in front of you, you envision them in your head. You think of them as an individual person, you recall what you know about them, and you put an effort into making your contact personal. It's not about what you can do for me; it's about the relationship and the connection.

So, if they were your best friend, how would you communicate with them? If they were already a referral source that sent you, oh, about 25 percent of the clients in your practice, how would you interact with them? How would you treat them? They are gold; treat them that way, whether they've sent you your first client or not.

So, on to non-traditional strategies. OK. [laughs] Here's the fun part. Definitely do the traditional strategies. However, let's talk about some non-traditional strategies--some creative stuff. The first one is one of my favorites, and I call it "The Tupperware party."

When the Tupperware lady sells Tupperware, what she does is she locates people to host a gathering of their friends and network. And so, that person becomes the hostess, and they get rewarded for doing so. And they gather a bunch of friends and family and neighbors and coworkers in their home, and the Tupperware lady comes by and does a pitch: shows everybody the Tupperware.

And it's a win for everybody. The Tupperware lady gets to meet people she wouldn't otherwise meet and make some sales. The hostess gets to gather her friends and network together. The people that attend get to have a good time and have a little party and meet each other and socialize. So it's an absolute win.

Now, the way that we apply this to private practice professionals is that, wouldn't it be cool if your referral source--somebody that thought that you were excellent at what you do, wanted to expose you to their network--were to host a gathering, and have you as a guest speaker, whether it's at their home or their office or at some other place? Wouldn't it be nice to have this intimate gathering of this person and their friends and network, and you show up and do a seminar for them?

A private showing, just for them. It's very, very powerful, it's very effective, because it is a very intimate setting. And the fact that the host invited you and wants to expose you to their network is a very clear endorsement. Even if they don't say anything, their behavior is saying, "Hey, I think this guy or gal is cool; very, very good at what they do. I think you should know them and work with them."

It's a very fun, it's a very easy, it's a very powerful marketing tool. This, by itself, by the way, if you were to do one Tupperware party per month--a private gathering, just with somebody you know and their network--that might be all the marketing that you would need to do.

Strategy number two is the joint venture. A joint venture is when you get together with a professional, whether it's somebody like you or somebody complementary--they don't do what you do, but they reach the same audience--or an organization. And you come together and you do a joint program. You support each other. There's something in it for both of you.

Now, sometimes what's in it for the joint venture is to provide value to their network, because they have a business. They have a network. Their goal is to provide value. So they keep their name in front of their network, just like you want to keep your name in front of yours. And they want to receive referrals from their network. They want the people in their network to bring their friends.

Well, you do, too. So, a joint program that you do together can create synergy. They have their network. You have your network. You do something together. It doesn't necessarily mean it's like a workshop that you actually put on together. They can sponsor the workshop. It might be under their umbrella or at their location. And you put on the workshop, and you both market it to your various channels and connections that you both have.

So, it's the joint venture; it's creating a win-win. This, potentially, can be done with such a wide variety of professionals, it's mind-boggling. Just think about it. Go through the phone book. Go through your contacts. Go through the people that you know that reach the audience you want to reach, and just identify these folks and just think creatively in your own mind what you could do with them: "Oh, yeah. With that person, I can do this. With this person, I can do that." You can really go to town. The possibilities are endless.

And of course, when you approach folks for joint venturing, just like when you approach folks for a possible referral source, you never, ever, ever pitch. You never ever, ever, ever call them up on the phone with the goal of telling them what you want to do with them, or what you want them to do for you. You never pitch. You always, always, always contact them with the goal of learning more about them and what they do and their business and who they reach--always, always, always.

I can't stress this enough. Chances are, you already know this, [laughs] but I just need to remind you.

So, you are calling with the goal of connecting with them, asking them questions, learning about who they are, what they do, how they do it, who they reach, and the conversation will and can organically segue into how you guys can work together. And they will ask you what you do and how you do it and who you do it for.

And I like to make it a game, actually. [laughs] Play with the idea that you wait for them to ask you. You don't just go into your pitch of who you are, what you do, who you do it for, and how you want to work together. You wait for them to ask you.

So, after a half an hour of you connecting with this person and asking them questions about their business, their organization, what they do, how they do it, who they do it with, wouldn't it be nice for them to ask you: "Well, tell me a bit about what you do?" Because then they're ready to listen to it. They're interested. They really get that you're a solid person. They're interested in you. And of course, they're flattered and feeling they have good will towards you because you are interested in them.

All businesses, all organizations, all professionals want to grow their business, and talking about what they do is how they do that. There's very, very, very few people that you will contact that will tell you, "No, I don't want to talk to you. I don't want to tell you who I am or what I do or how I do it or who I do it for. It's a waste of my time. Don't waste my time."

I've gotten a few of those responses from lawyers, [laughs] lawyers with busy practices that didn't want to be bothered. But most everybody else is completely happy to talk to somebody interested in their business, their profession, who the are, what they do, who they do it for.

So that is always, always, always how you start the conversation, how you connect with possible joint venture partners and with possible referral sources. You contact them, interested in who they are, what they do, who they do it for, how they do it. I hope that's clear. [laughs] I tried very hard to make that clear.

OK. Strategy number three: introductions targeting your ideal client. This is where you actually laser in on somebody that you'd like to meet--your ideal client that you've identified that you want them to hire you. You want to work with them. And then, you tap your network. You find out who knows them. Who knows somebody that knows them? Who knows somebody that knows somebody that knows them? [laughs] And you want an introduction.

And if you look in the newspaper, your local newspaper, you'll find an occasional story highlighting somebody that you might want to work with. I mean, has that ever happened to you? Have you ever read an article about something, "Ooh, I'd like to work with them! I want to be their coach! I want to be their consultant!"

Sometimes these are famous people; sometimes not. If it is somebody famous, then oftentimes this can really boost a practice when you've been the practitioner serving this famous person, and they're willing and able to say so. I know many practitioners that charge lots and lots and lots of money - ten times the ordinary rate. But they only work with a very few, select clients.

They only work with the people they want to work with. Part of how they get these clients, is, they target them. They go after them! What a concept! It's completely possible. It can be very effective. So, that's Non-traditional Strategy Number 3.

Non-traditional Strategy Number four is, market research. We've covered market research as a way of connecting with the people you want to reach; finding out who they are, what they want, what they need, what their goals and challenges are. Collecting the information you need to target your services, your programs, your marketing for them.

Whenever I've seen anybody do market research, whenever I've done market research, I've always had a nice side effect. Which is, I end up getting a client or a referral. I'm targeting somebody for market research, and interviewing them, and talking with them about what their needs, goals and challenges are.

And then I'm talking with them about what my plans are, the new product I'm rolling out, the new program I'm rolling out. When I do that, oftentimes I'll get the response of, "You know what? I know somebody who'd just love that." Boom! There's a referral. It's a powerful enough strategy that if you do ongoing market research, you will generate referrals and clients on an on-going basis.

On-going market research is not such a bad idea, ladies and gentlemen! Why not?

Learn about your niche. The people in your niche, on an on-going basis. It doesn't have to be something you just do once and then leave behind. You can do it on an on-going basis. Non-traditional Strategy Number 4: market research.

Non-traditional Strategy Number Five is, seeking resources for your clients. Seeking resources. When you work with your clients, they have ongoing needs. They have multiple needs. You end up making referrals, suggesting resources, all the time. Whether it's a book, a product, an organization, a professional. You are a referral source.

It's actually a great way to connect with other possible referral sources by seeking resources for your clients. It's a legitimate activity. You need these resources. An example, when I was specializing with couples in crisis, I really, honestly, needed to know a few lawyers, family lawyers, that were good attorneys that promoted family harmony and would work together and they were not sharks.

My goal, when a couple wasn't going to make it, is, well, if they're going to split up, at least let's split up as amicably as we can, especially for the benefit of the kids. I just had the hardest time finding attorneys that would have that kind of greater good kind of mindset.

So I constructed a survey. I went to the phone book and I compiled a mailing list of over a 100, closer to 200, family law attorneys in my area. I sent out this survey to them, with a cover letter. About 10 a week. A week after I sent the survey I would follow up with a phone call.

My goal was to get the survey returned. And also, it wasn't totally altruistic here, I wanted to connect with them as a possible referral source. I truly was looking to identify attorneys to partner with that would work on behalf of amicable divorces - be team players to work with me.

I was also looking for family law attorneys who would see the value of somebody like me, to work with their clients. So I sent out these surveys, 10 a week, and I would follow up the following week with a phone call. The survey responses started coming in.

There were a bunch of attorneys that ignored the survey. There were some that when I called them on the phone, they pretty much said, "Don't bother me!" Most were very gracious and were willing to talk with me. In a matter of months, I ended up having lunch with some of them, and developing pretty decent relationships with some of them.

They started steering some clients my way, and I started steering some clients their way. And this was starting from scratch. I knew no attorneys. There's an example of, I was seeking a resource, an important resource, for the people in my niche.

So if you take a look at what the people in your niche, the clients that you serve, what it is they need, what other professionals that they are likely to need to work with, then those professionals become potential referral sources. You can target them with the idea of seeking resources for your clients.

Then in the conversation... Remember we were talking about how to approach? You ask them about their business, and their service, and how they do it, and who they do it for. It's an informational interview. You are collecting information. Then, the conversation can go around to who you are and what you do.

By the end of the conversation, you just might have a referral source. It's a very, very worthwhile activity. It's a non-traditional strategy. But it's absolutely, totally appropriate. It's not sneaky. You honestly do need resources for your clients. Say you're a couples therapist. You already have a few attorneys that you refer to, that you know, like and trust.

Well, there's nothing wrong with meeting more attorneys and adding to that list! So these are our non-traditional strategies for developing your referral sources. The Tupperware party, joint venture, introduction targeting your ideal client, market research, and seeking resources.

Again, these, by itself, might be all you need to do to market your practice. Don't need a website. Don't need to get speaking gigs. Just focus on these. We've covered traditional strategies and non-traditional strategies. This is the how.

Woman 1: A friend of mine from Wisconsin sent me an email saying that there was a law practice up there advertising on the radio saying that they offer life coaches and mediators with their practice.

David: Well, that's cool!

Woman 1: Yes. Anyway, I'm still waiting for him to get done with all his trials so that we can have lunch. But I'm not as clear as I wished I could be on how I could actually help him.

David: Well, you don't know.

Woman 1: So I just need to just say -- how would you feel, or how would working with a life coach help you with your clients? Or, how would I do that?

David: You see, the wonderful thing about it is, you don't have to have a pre-planned agenda. You don't have to have a proposal to pitch.

Woman 1: Oh! That makes it easier!

David: Yes!

Woman 1: Yes! [laughs]

David: All you need to do is target people that you see as good potential referral sources. Here's a great example, because what they're up to is cool! So you contact them and say, “I want to take you to lunch. I want to find out about what you're doing and how you're doing it! This is so cool!”

And people are flattered. They love to be seen and recognized. And it's authentic! You do think it's cool. And so you take them to lunch, and you ask questions. And you find out how it's working and you ask questions like a coach and you uncover whatever challenges or needs they might have, and the conversation will naturally segue into how you might work together.

Anna: OK.

David: I mean, who knows? Maybe there's no fit at all. Maybe you can't work together, but the odds of that are very, very, very low. How about this: think of it like a coffee date. When you're single and you go on a blind date or you find somebody through the Internet, you're meeting them for the first time: the best thing to do is to have no expectations. You don't want to build things up in your mind about how it's going to be. You want to have an open mind. You want to meet this person. You want to see who they are. You want to see where the chemistry is and how you guys click, or not. You want to be very curious and interested in who they are. You hope that they're curious and interested in who you are, and you don't have an attachment. You don't have an agenda other than that.

It's the same thing when you're connecting with a potential referral source. Do not have an attachment. Do not have a specific agenda. You have a general agenda, of connecting with them, learning more about them, and seeing about the possibilities of working together. This law practice is such a great example because you're attracted to them because of what they're up to. If nothing else, you have a great lunch and you connect to a creative fellow spirit here that you'll now know each other's first names. But chances are it'll go further than that. Does that make sense?

Anna: Yes, it does. It helps to take the agenda off because it's letting go of the outcome... Going with some attachments on outcome is what makes it so difficult.

David: Yeah.

Anna: Going without any attachment to outcome takes the potential for rejection out of it, and just makes it a lot easier. Yes, that makes sense. Thank you.

David: Absolutely. And you know, people do not like to have your agenda imposed on them.

Anna: That makes sense too. I hate it too.

David: We are relationship people. We're private practice professionals. We understand people. We connect with them and help them all the time, and this is not a whole lot different, except instead of connecting with and helping a client, we're looking at connecting with a potential referral source. We do that pretty much the same way we would connect with a client or a prospect. If a prospect calls you, you don't want to twist their arm into working with you. You want to find out about the fit. You want to ask them questions about who they are and their situation. Same thing with a referral source. This is what I mean by leveraging your strengths: you do this all the time. Hopefully. [laughs]

In our next module, when we talk about enrollment, we'll talk about more skills and strategies about connecting with potential clients and referral sources. But yeah, very well put, Anna. Just letting go of your attachment, not having an agenda, makes it a heck of a lot easier.

OK, moving right along, I'm going to page four in the study guide, and this is section two: who to target as your referral sources. I have a tool for you. It's called the Effortless Referrals Grid, and you can download that from the Private Practice Marketing Secrets member area. There's a link for it from your study guide. It's very, very simple: there are seven categories across the top, and who to target as your referral source, there's seven line items here on page four. The first is 'Clients and Former Clients.' Second is 'Prospects.' Third is 'Colleagues.' Four is 'Complementary Professionals.' Five is 'Organizations.' Six is 'Public Relations and Media.' Seven is 'Niche Ownership Activities.'

This is who to target as your potential referral sources. The effortless referrals grid is just to provide some structure to this. So, you look at the first column. It says, Clients and Former Clients. Your goal is to go through your files, go through your data base.

Put down the names of clients and former clients in this column that are your potential referral sources. The effortless referrals grid, the purpose is to provide you focus and an agenda, a to-do list of people to contact as potential referral sources.

You can go ahead and write them down in rank order. The people that you want to contact first, and the people that you want to contact after them. There's no harm in going through the path of least resistance and going with the highest likelihood prospects first.

So, in the first column gather together all the clients and former clients that you can think of or identify, that would be potential referral sources. So, the clients that you didn't like, the clients that fired you because they didn't like you, the clients that you fired them because it wasn't a fit and it didn't work out very well, you're probably not going to be contacting them.

So who are the clients and former clients that are potential referral sources that you would want to have a conversation with them? That you would want to ask for referrals from them? It is my view that it is always OK, in fact it's necessary, to ask for the referral, from your clients.

In fact, when I started out in private practice and I took my very first marketing workshop. I remember this very, very clearly. I remember the hotel where it was at. It happened on a weekend. It cost me $800 dollars. Basically, I got three things from this marketing workshop.

The first was, how to construct a yellow page ad. The second was, lunch a month. If you do nothing else, you have lunch with a potential referral source at least once a month. Lunch a month. And the third was, ask for the referral. They even gave us a card with a question or statement on it exactly how we can ask for the referral. It was quite a long statement. It was quite awkward. I can see why they constructed it that way. It had to do with, if you appreciated what we've done together I’d appreciate you letting somebody else know, they would appreciate it and so would I.

Or something like that. It invokes several principles. One principle is that, if you've helped somebody, if they've benefited from working with you, they appreciate it and they are grateful for it. And they want to give back. They want to help you.

There is such a thing as the Law of Reciprocity. You can read about it in the book, The Power of Influence by Robert Cialdini. We'll talk about that more in the next module. But, the law of reciprocity says, that people like an equal relationship.

They like equity in the relationship. If you've done a favor for somebody, they feel like it's unequal until they do something back. So even though your clients are paying you money, you would think that would be enough, but you know, no. If they've really benefited from working with you, they want to give back.

I've had clients...one of my favorite clients, a couple I worked with for years. Every Christmas they'd give me a nice big box of See’s Candy. I looked forward to that every Christmas. I love See’s Candy. That was their way of giving back.

You might have had clients bake you cookies. Or give you a bottle of wine. They appreciate your help. Just paying you for your services isn't enough for them. That's like, you know, expected. So clients or former clients who have benefited from working with you, they want to help you out.

They want to give back. They want, also, to tell somebody else who can benefit from working with you. Now, you realize: they have relationships. They have family. They have friends. They have neighbors. They have coworkers. They have people they care about in their life. When any one of those people can benefit from working with you, as they have, they want to make the referral. They do.

Now, sometimes what you do might be a bit embarrassing for people to talk about. If you're a proctologist. [laughs] Or sometimes, if you're a marriage counselor and couples don't want to talk about being in trouble. But other times, if they benefited greatly from working with you, they do want to talk about you. They're proud to say, "Yeah. Our marriage was in trouble, but now we're doing great because of this person over here."

So, it is my view that it is always OK to ask for the referral. It is necessary to ask for the referral. Your clients want to refer to you, especially when they benefited from working with you. And that $800 workshop, that was their big message, so it must be true. Ask for the referral.

And when can you ask for the referral? When you've had a great session, when you're both feeling good about what's going on. You can also ask for the referral from former clients. You can reconnect with former clients, with the goal of reconnecting. And who knows? They might want to come back and work with you. We call this "the recall," by the way.

Just like the dentist: he sends you a little notice saying, "Hey, it's time for your checkup or your cleaning." Or like the oil change place, they send you a little card--at least, they do with me [laughs]--saying, "Hey, it's been three months. It's been six months. It's time for your next oil change." You can do this with your former clients as well.

Oftentimes, in a private practice, your clients stop coming, not because they don't need you anymore, but because life has gotten in the way. They've gone on an extended vacation, or things have gotten intense in their work and they needed to take a break. And oftentimes, they are grateful, they are happy to hear from you and stimulated to start things back up again. So the recall is a wonderful way to connect with former clients, and it is totally under-utilized amongst most private practice professional.

So, don't forget about your former clients after they stop working with you. Reconnect with them. And don't have an agenda. I mean, when you contact them, you don't know if they're ready to pick up again with you or not. You don't know if they have anybody to refer. Just reconnect with them because you have a relationship--you have a history--and say, "Hey, this is David. I was thinking about you, and I thought I'd give you a call, see how you're doing. How you doing?"

Nothing wrong with that. It's the personal touch. It is what people appreciate about private practice professionals, when they provide the personal touch. And given that you are an expert, you have a busy practice, you have a degree, you have training, people also feel flattered. "Wow! Dr. So-and-so or Coach So-and-so took time out of their busy day to call me--little old me! I feel loved. I feel cared about."

So it is always OK to ask for the referral. When to ask for the referral is when you've been doing good work. And don't forget about former clients. Please do reconnect with them and ask for the referral as well. But don't call them asking for the referral. [laughs] Call to reconnect. So that's column number one.

Column number two: your prospects. These are not just your current prospects. This is everybody that's contacted you, ever, interested in your services, but didn't end up hiring you. You want to make a special file for them because, remember, there are bluebirds and there are boulders. The bluebirds are the ones that are excited and motivated, and they don't require any enrollment at all; they practically enroll themselves. They fly in your window.

Most people are boulders. I'd say more than 80 percent are boulders. And boulders have a lot of inertia, a lot of resistance. They want to, they need to, but there's a lot interfering with them actually taking the step to hiring you. Now, sometimes they don't hire you; they hire somebody else. But still, they are in your prospect list. And just because they work with somebody else doesn't mean that they're happy with that somebody else. So, maybe a year later, they're happy to hear from you and give you a try.

And prospects are generally people that you've already had a conversation with. You've already made a connection. You've already learned about them. They've already learned about you. That's a lot of time and trouble, so don't just let them slip off the face of the earth. They are still valuable assets to your practice that you can reconnect with, check in, and find out if they're ready to start working with you--especially the boulders.

I have a very special place in my heart for boulders, because I know how hard it is to step up and do something challenging. Most of us private practice professionals, we do something that our clients are a bit challenged by. I can totally understand why they'd have some resistance. Yeah, in our value system, like, "Well, we're wonderful. We're good. We want to help our clients. Our clients benefit from working with us. Who would not want that?" The reality is that most people would rather do something else with their time and money.

So I have a bit of an evangelistic mindset when it comes to boulders, because I want to save their soul. [laughs] I want them to get the benefit of working with me, even if they're having a hard time stepping up for it. I don't take it personally that they haven't hired me yet. And I figure if they have this very important area of their life, they put it up on the shelf, that that's their loss. And I really hate to see that. I'm going to do everything I can to prevent that from staying on the shelf.

So, column two is prospects. So, you need to gather together all the people that you've talked with about your services that didn't decide to hire you, going back as far as you can. And on an ongoing basis, keep a special file. Organize your database so that you can identify these folks, and have a way of reconnecting with them, of following up with them.

Column number three is your colleagues. These are people that do the same thing you do. They have the same titles, the same training. But you know, when you guys get together, [laughs] no two of you are alike. Even though you have the same job title, you work with the same population, you do it differently.

So, yes, they're your colleagues, but you can have mutually beneficial referral relationships with your colleagues. It happens all the time that somebody you talk to has a need that you don't address, and it's nice to have your colleagues in your phone book so that you can refer to them, and you want them referring to you.

So, in my practice, for a long time, I was known as the go-to guy for two kinds of clients, really, in my area. The first was parents and teachers of children with severe behavior problems. Any kid with a behavior problem: "Oh, yeah, send the parent or teacher to David Steele. He's the guy."

And the other was couples in crisis--couples that were having a really hard time that no other therapists wanted to touch. Now, very few people know this, but most therapists are not trained to work with couples. Most therapists are trained to work with individuals. And most therapists, they want to work with individuals: depressed individuals and anxious individuals. And when it comes to couples, yeah, they'll take the occasional couple, but when it's a difficult couple, they want to have a place to refer to.

And me, in my practice, I did not deal with addictions. Didn't want to do it at all. Whenever that came up in my practice, I always referred it out. It was one among many things.

So, we have things that we're good at, that we specialize in that we become known for, that we want to work with. And we have [laughs] things that we don't want to work with, but we have prospects and clients that have those needs. So, there's lots and lots of networking opportunities with your colleagues.

So, column number four is complementary professionals. These are the professionals that work with your clients, the people you want to reach, but that don't do what you do; they do something different. So the example was the family law attorneys, when I was working with couples on the brink of divorce: complementary professionals.

Now, this is a gold mine. You should be able to make a list around the block of all the various complementary professionals that your clients might work with. And the strategy that we talked about, the non-traditional strategy of contacting them seeking resources for your clients, is a good one.

But most of these professionals, they want referrals. They want to build their business and practice, too. Even those that have a full practice, the ones that are good, never take it for granted. And they always see the value of connecting with other professionals, having more and more people know about who they are and what they do--always. You don't turn off the marketing spigot. You don't stop talking about what you do because you've got a full practice. You keep it going. That's the way to keep a full practice.

So, most professionals know this, and so, when you contact them, you contact them interested in who they are and what they do, who they do it with. And then you have that conversation. No attachment. No agenda, other than connecting and learning about them. And the conversation organically goes towards what you do and if there's a fit there for you guys to work together or refer to each other. So that's complementary professionals. This, by itself, could keep you busy for a very, very long time.

Column number five: organizations. Organizations can be nonprofits. They can be churches. They can be group practices. They are organizational entities; they are not individual professionals. Organizations have receptionists. They have buildings. They have a [laughs] president and a vice president. They have directors, people like that.

Partnering with organizations has a tremendous benefit because, generally, they reach many, many more people than an individual professional. So you, potentially, have a built-in audience of hundreds or thousands if you partner with the organization, so it's well worth it. However, you have more hoops to jump through.

And probably my biggest piece of advice: the secret to getting in the door of organizations is making friends with the receptionist. Oftentimes, people get frustrated, and they wonder, "Well, how can I reach the decision-maker? Who is the decision-maker, and how can I reach them? How can I connect with them? How can I partner with them?" Well, the solution is the receptionist. [laughs]

The receptionist is usually the gatekeeper--the one that knows everybody, the one that decides what goes through and what doesn't, the one that is generally charged with shooing away the solicitors. And so, if you are honest with the receptionist about who you are and what you're up to, why you want to connect with them, generally they will help you.

And remember, by being honest, I don't mean pitching. I don't mean: "Well, here's what I want to do, " in a very self-serving way. By being honest, I'm going to say, "Well, I am a private practice professional specializing in this, and I work with these kind of clients, and I wanted to talk with so-and-so about your organization and who you work with and how you do it." That's pretty much it.

Remember you are collecting information, you want to create connection first before you even know how to collaborate. “Connection before collaboration,” I just made that up!

So, organizations like churches, nonprofits, hospitals. Here is one, I had a column in a local parenting magazine and I got contacted out of the blue. Based upon my column, somebody read my column and it happened to be a social worker in a local hospital. And the social worker was looking for guest speakers for her new mom's group, so in this particular hospital every new mom, every woman that had a birth in that hospital was invited to the new mom's group and they had a weekly meeting. In every weekly meeting they would have a guest speaker, and this social worker was in charge of getting the guest speaker.

So, she read my column in the local parenting magazine, contacted me, we booked a date, I came by and gave a talk. They loved it, she asked me back, I came back, they loved it again, and after that I was a regular speaker. And after that I became the go-to person for this social worker; anytime this social worker talked with a mom that was having trouble with her kids around discipline, around adjustment of the new baby, even around couple issues. This one referral source became a champion. This one referral source made my practice at a time when I was trying to figure out how am I going to get more couples in my practice. And it's because this referral source worked in an organization. And I helped her solve a problem, which is #1, to have a good guest speaker for her audience and #2 to have a good resource for her clients, the people she was working with in her organization.

I couldn't have planned that any better and these kinds of relationships can't be planned. I mean you can fantasize about it, but you can't make it happen. What you can do is you can target the organizations, identify who they are first, and then figure out if you know anybody inside them, or get an introduction based on somebody that you know that knows somebody inside them or making friends with the receptionist. Call the receptionist up and say "Hey I am a private practice professional, I do this, I specialize in this." And you know, who should I talk to, who can tell me more about who you guys are and who you do it with? So that is organizations.

Column #6 is public relations and media. Now these are referral sources because the media like reporters, journalists, people that work in newspapers, television, radio, and not just those kind of media, but the free inserts and free weeklies that you pick up at the library and at Starbucks, they all need content, they all have like announcement sections, they all love public interests kinds of stories, things that the public would be interested in.

And the thing about private practice professionals is that you work with people, you help people in an area that is needed in their life, makes great human interest stories. And when you connect with people in the media, people in a position to communicate to other people, wouldn't it be nice if they came to know you, like you and trust you and thought that you were the go-to person for something and ended up talking about you a lot and referring people your way and writing stuff about you.

I mean that's how Dr. Phil started right? Here is the media, here is Oprah, Oprah likes Dr. Phil, now Dr. Phil is a big cheese all because of the media, all because somebody liked him and promoted him in the media. You can do the same thing on a much smaller scale or maybe you will be as big as Dr. Phil and Oprah. But, that is basically how it works.

So, anything you do public relations wise, sending out a press release announcement of something, sending story ideas, identify the local reporters and journalists who tend to write stories that are related to your field. Just read the newspaper and magazines and the local freebies. Who's writing these stories--human interest stories or other things like that? And then contact them. Generally, they all have email, and they're easy to contact by email, and they actually prefer contact by email nowadays. Press releases are mostly sent by email now, not anyway else.

And you can also, besides pitching story ideas, do several things. Number one, you can write a story as if they wrote it, in the style and headlines and everything, just like a newspaper story, and go ahead and send it to them.

And it's amazing how often these things get picked up. I mean, it's effortless. They don't have to write anything; they just have to print it. And sometimes they use your byline: "David Steele Special to 'San Jose Mercury News.'" And other times, they might contact you, ask you a few questions, change the wording around a little bit, and then put their byline on it. And that's [laughs] just fine.

And another thing you can do is to treat them like any other referral source, in connecting with them, sending them email, snail mail, calling them on the phone, inviting them to lunch. And you're doing so because their work has attracted you. You really like what they do. They write about the people in your field, and you want to talk with them more, and you want to educate them about what's going on in your field. You want to help them do their job. And of course, that's going to benefit you.

So, just like connecting with a potential referral source or organization, you're doing so without attachment. You're doing so to be of service. You're doing so because this person has gotten your attention as somebody that's making a contribution in your field. They're writing human interest stories. They're writing about something that's important to you and your field.

So, just because you might feel like a little old nobody--nobody knows you; you're not rich and famous--trust me in that people in the media, people that are in a position of communicating with the public, they see you as an expert. They see you as somebody that's making a difference in people's lives. They're thinking about different story angles and hooks. What headline might get people's attention? What story angle might be interesting for people to read?

I just talked with a reporter yesterday who's doing stories on relationships during the holidays and being single during the holidays, and he contacted me based on my position in the field. But, if I were reading his local paper and I were reading these stories, and I'd really get that: "Here is a reporter that cares about relationships. I want to connect with him. I want him to know about who I am. I want to help him do his job." So, consider that.

So, do a little bit of research. Read through the newspapers, the magazines, the local freebies, the radio, the television. Identify the reporters, the editors, journalists, anybody that you can identify that is interested in your field that does stories about your field, and write them in column number six.

Column number seven is niche ownership activities. What this means is things that you can do, ways in which you can show up to own your niche. For example, when I transitioned my practice from therapy to coaching and wanted to be the go-to person for relationship coaching in my area, I decided to start a weekly singles' event: a Friday night social, every Friday night. After doing some market research, I saw a need to have a gathering for singles that was safe and supportive and not a meat market.

They didn't like the singles' scene. They didn't like meat markets. They didn't like the bar thing. Give them an alternative, and do some seminars and workshops and teach them something about relationships, and it'll be a marketing activity as well. It was a lot of fun. It was very successful. It helped me own my niche for many years in my area. It was big commitment: every Friday night. It was not my desire to work every Friday night, so I brought in other people, and we shared the load.

Think about what you can do to own your niche. If you're a wellness practitioner, you can conduct a wellness clinic on a once-a-month basis. You can have it at your office. You can also partner with other local businesses. "Wellness Clinic, sponsored by Bob's Drugs." "Wellness Clinic, sponsored by Sally's Coffee Shop."

And so, for two or three or four hours, on a once-a-month basis, it gets advertised, it gets circulated and announced, and people show up, and you conduct a wellness clinic. That would help you own your niche. You become known for that.

Anything that you become known for helps you own your niche. A column in your local newspaper, magazine, free weekly, will help you own your niche. A radio spot.

I mean, I just love it when private practice professionals are on the radio. I especially love call-in shows, where you're an expert in your particular niche, and people that have that particular problem are challenged: call in. And you consult with them, right on the air. I just think that's a blast, and I think it educates the public tremendously. That'll help you own your niche.

Teaching a class at the local college or community center. Everybody that signs up for your class certainly comes to know you and talk about you. And how about the people that see your class listing time after time after time, but they don't sign up? But next time they have a need, or have somebody in their life that has a need, that's related to you, they refer to you, because you've been in their local listings time after time after time. You become the go-to person, in their mind. You become the person they think of.

There are many, many ways that you can own your niche. So, column number seven is where you make a list. And on Friday, if you want some ideas, we can brainstorm. Since I've done this in many ways--I've owned my niche in many different ways--I would just LOVE to support you in owning your niche. I strongly believe that all private practice professionals--since we're unique, since we're the pioneer in our field, in our practice--nobody does it like us. We all have the potential to own our niche.

So that's the effortless referrals grid. That is who to target as your referral sources. You make these lists. Spend two, three, four, five hours collecting information, doing the research, making theses lists. It'll keep you busy for a long time, and pay off tremendously.

Woman: David, I just want to tell you: this is really helpful to me, because I am so low-tech, that these things sound like very doable things.

David: Absolutely. And one of the things that just PAINS me is to see private practice professionals going down dead ends that don't pay off, spending thousands of dollars and a lot of time on a website that ends up not doing much for them. So, because we conduct a very personal, intimate service, the low-tech actually is the most effective.

When somebody wants to have a virtual practice and do everything on the telephone and Internet, low-tech is not as possible. But if you're a traditional practitioner who works with your clients in person, low-tech is actually the most effective.

Woman: Yeah, I'm really excited about starting the complementary professionals, you know, getting in contact with them creating a referral source. That's such an easy-in when you really do want to know what they do so you can bring them some business.

David: Right.

Woman: So that just sounds like an easy place to start.

David: Right, the hardest thing is figuring out where to start, there's so many possibilities. And, next we're going to talk about how to get in the door, and really, you don't need any fancy tricks to get in the door, other than just contact them and showing interest in what they do.

Because they are business professional who want to be recognized for what they do. They're in the business of telling people what they do. You can always spice it up a little bit, so we're going to talk about that next. So, thanks very much for your comment.

Turning to page five of your study guide, let's talk about how to get in the door of referral sources. These are what I call door openers. So, as I mentioned a little earlier, you really don't need anything to get in the door, other than your smiling face and your interest in what this referral source does. Because referral sources generally want to talk about what they do, and are open to talking with you, and if they're not, they'll let you know.

However, having door openers is a way to differentiate yourself. It's a way to get their attention in a positive way, and make an impression. A good powerful first impression and you know that first impressions are very very important, and they are lasting. So, how can we increase the likelihood that we get in the door and make a positive first impression?

I have eight ideas for you and the first one is pretty obvious, it has to do with gifts. What kind of gift could you offer a potential referral source? Let's take Anna's situation. There's a local law practice that hires life coaches and people like that. They're very creative, they're very progressive, and she would really like to connect with them. What are possible gifts that she could bring to increase the likelihood that they would want to talk with her, that they would have a positive impression of her?

Well, how about a book? Since we are an expert in our field, chances are we have written a book or a booklet. And even if we haven't, there is a book that really highlights what we do, our message, what we want the people in our field to know about. Chances are you have your favorite book. You have the book that really, you know, stands for what you do, and what you want folks to know about what you do.

So, books are a great door opener, and you can just send them the book and follow up with a phone call, you know, letting them know you sent it, asking them if they got it. You can bring the book along; you can bring a couple of copies and give one to the receptionist. [laughs] You know, if you consider yourself an evangelist for your profession, you want the whole world to know about your area of expertise.

You want to make a difference in the world related to your area of expertise. You want to spread the gospel. Just like the missionaries are passing out Bibles door to door, you want to spread your gospel door to door. So, giving a potential referral source a gift of a book is a great way to do that.

And then there's gift certificates. Gift certificates make great gifts. You know, everybody likes Starbucks, everybody shops at Target, and everybody can go online and order something from Amazon, so gift certificates are always a great way to get in the door. You send somebody a gift certificate, you send them an email; send them a phone call letting them know it's on the way.

If you think about it, this is not so unusual, I mean it's a bit unusual for private practice professionals to do it, but I don't know about you, but I have gotten organizers from real estate professionals that want the listing to buy or sell a house. I have gotten mugs, I have gotten gift certificates from various professionals that want my business.

So, if it's just sent on a mass basis like this real estate agent sent out organizers, by itself it's a waste. If you are sending something and you are following it up, then it's a door opener, you want to connect, you want to create a relationship. And things like a calendar, calendars are great, everybody needs calendars and in my practice for a long time I would send out a calendar at the end of the year for the new year and it had my name and contact information on it, and in January about a week or two after sending this calendar out, I would always get a flurry of calls. It was a great way to start my year and having literally a full calendar after I sent this calendar out and it was a gift to the people in my network, and to my referral sources, as well as clients and former clients. And it helped to keep my name in front of them. And around the beginning of the year is when people start to look around and say, "Hmm I need a new calendar, " so if they get one in the mail, they are very likely to put it up in some place.

Now, we talked about the idea of a boomerang device. A boomerang device is anything that you put out there that has the effect of returning back to you and we talked about for example the CD being a good boomerang device, you put a CD out there of you speaking and has valuable information for the people in your niche and has your contact information on it. Chances are it's not going to be thrown away, it is going to come back to you in different ways. So, if you have a CD, CDs are great gifts, wouldn't it be nice to send or drop off a CD. And so your referral source at their leisure can pop it in their car or wherever they are or load it in their iPod and get an experience of you.

And you realize that it is not totally conscious, but whatever they experience of you, their generalization is that is what their clients would experience of you. So, think about this for a minute. They assume consciously or unconsciously that whoever they refer to you, their network, the people they care about would have the same experience that they have of you. So if they have a positive experience of you and they assume that if they refer somebody to you that person would have a positive experience of you as well.

So, anything you can do to give this person a positive experience of you is helping build a relationship with the referral source, helping them feel good about referring to you. So, a boomerang device works with prospects, because it gives people an experience of you, it provides value that ends up coming back to you. Well, it works with referral sources as well.

So, those are some different ideas for gifts, books, gift certificates, calendars, mugs, boomerang devices.

So, second is the seeking resources idea of how to get in the door referral sources, because you are seeking resources for your clients and the people in your network, great way to get in the door. They are in the business of telling people what they do, of wanting people to come in the door, they see the value of a mutually beneficial relationship. Anybody shows up on their doorstep or on their telephone or contact them by email, interested in what they do, that gets their attention. That is why I do not want you to contact them and just do a pitch-

"Excuse me, Mr. Referral Source. I'm David Steele. I'm a relationship coach. Here's what I do. Here's who I do it with. Got any referrals for me?" No way. You’re contacting them interested in what they do, seeking resources.

Strategy number three of how to get in the door with referral sources is the joint venture proposal. And we talked about this a bit. In general, a joint venture is something you do with somebody that you trust, that you know and have confidence in. It's not generally something you do with somebody you don't know or just met.

So, generally, you build up to a joint venture. So, when you're having this conversation and you are talking with a referral source about who they are and what they do, who they do it with, and then the conversation segues eventually into ways that you might play together, you might start out small.

It's a good idea to do a test run of some kind before you commit to a weekly or monthly whatever; do a one-time event. Before you end up doing a half-day or full-day workshop together, do a one-hour seminar.

Most professionals, most organizations, are looking for ways to provide value to serve their clients better, always. You won't find very many that are absolutely content exactly the way things are; they don't want to change a thing. Usually, we're very, very open as to different, creative ways to provide value and make a difference for the people that we are mandated to serve. So that's the joint venture proposal.

Strategy number four of how to get in the door is the third-party introduction. And we covered the strategy of targeting your ideal client and getting an introduction to them. This is similar. You target your desired referral source, and then you tap your network: you find out who knows them, or who knows somebody that knows them. How can you get in the door? How can you wrangle an introduction?

It is a very, very effective way to go. All it takes is somebody that knows them, even peripherally--their kids go to the same school or something--and just having a 15 second conversation. It can even be done on the telephone on a conference call. And so, "Hey, this is so-and-so. I'd like to introduce you to so-and-so. I really think you guys should meet." Boom, done.

And the third-party introduction, whoever does the introducing, it's like they are endorsing you, even if it's not explicit. They don't have to say, "And I really think this person is highly qualified and very good at what they do. I think you should talk with them, refer to them, do business with them." No, they don't have to say that at all. All they have to do is provide the introduction, and the endorsement is strongly implied. They wouldn't even bother doing the introduction if they didn't believe any of that.

So, third-party introduction is actually very easy. I mean, if there's somebody that you know that knows somebody that you want to meet, [laughs] it's incredibly easy. Just ask them: "Hey, can you introduce me to so-and-so?" "Oh, sure. How do you want to do that?" [laughs] I think the hard part is getting up the courage to ask. I think that's where a lot of us hold back, in we don't want to put ourselves out there.

But when you think about it, this is what networking is all about. Nowadays, the social networking websites are big. MySpace, Facebook, LinkedIn--these are all websites that rely on third-party introduction. I'm inviting somebody to join a network and having people join that network from other people that are known, and it expands exponentially.

So this is the way society is. It's about who you know. And people generally enjoy connecting other people, especially if they like you, especially if they think that you guys would get along or that there would be some mutual benefit. It feels good to do that, so don't be shy about asking them to do that. It would feel good for them to do that.

Strategy number five of how to get in the door with referral sources is common ground. This is where, if you have anything in common with a potential referral source, that is a great way to get in the door, even if it's: your kids go to school together.

This is where it comes in handy to belong to your alumni association. Say, "Hey, we went to the same high school." "Hey, we went to the same college." So, anything that you have in common: "Our kids play soccer together." "We belong to the same professional association." I mean, if you're looking at connecting with colleagues, that's easy; you know what common ground you have.

If you're looking at connecting with complementary professionals, that's also easy. You target the same population. You live in the same town. [laughs] Chances are, you know lots of people that they know, and vice versa.

So, any common ground is a possible door opener, when you contact them and you let them know what you have in common. And it might be enough to say, "Hey, I'm David Steele. I'm a local relationship coach, and I'd like to talk with you about your law practice, and I'm looking for resources for my clients." That might be enough.

It wouldn't hurt to say, "Oh, by the way, I noticed that our kids go to school together at ___________." [laughs] Just something else to get their attention and say, "Ooh. I feel a little more obligated to return this person's call now that we know our kids go to the same school."

Strategy number six of how to get in the door with referral sources is offering a complimentary service or barter. A complimentary service or barter. This could be in the form of a coupon or gift certificate. So, for example, you can put together a gift certificate for your class or workshop, and you can send that to the people that you want to refer others to your class or workshop. And you can send them a number of them. Just say, "Hey, use this for yourself, or pass it along."

When I was conducting my weekly Friday night socials, I had a policy of comping the local helping professionals: the therapists, the counselors. They might have been single, but they were also in a helping capacity. I wanted them to refer their clients, and so I let them know: "Come on by. No charge." I never charged them for walking in the door. I treated them as special. I gave them a tour. I honored them. I gave them the paperwork. I gave them special seating, did whatever else

I could do to make them feel special.

So, it can be a very effective way to get in the door, by sending a gift certificate, or a number of them, or some coupons. And of course, you don't just do that; you follow up with an email and telephone calls, and maybe a personal visit. And you want that person to consider using the gift certificate for themselves, or passing it along to somebody. And when they do pass it along, that's a referral.

Give them a whole stack of gift certificates. [laughs] Everybody that they refer is comped, for one day or one session or one week, or whatever it might be. And so it makes them look good to whoever they're referring: "Oh, not only are you referring me to this person, but I get to try them out for free! Oh, wow. Thank you very much." Because of your special relationship with them. So, offering a complimentary service or barter.

Now, barter's interesting, because chances are that there's a lot of people that would like to take advantage of your service, and you can benefit from their service. So you can work together! Imagine all the possibilities! You're a marriage counselor; you need construction. Be the marriage counselor of your subcontractors. Barter chiropractic care for real estate services; there's endless possibilities. This is the way the economy ran years and years and years ago, before money was invented. There's nothing wrong with doing it in today's world. But it's also a great door opener to offer that.

Strategy number seven of our door openers is to share new material for your niche. This might be articles, books, cds, a mini-poster. A mini-poster is like having a tip sheet or something, and you just print in out on nice stationary, or maybe laminate it--maybe not--maybe put it in a sheet protector--maybe not. But at least, printing it out on nice stationary, so it becomes a keeper. It has valuable information on it. It becomes something people might want to tack on the wall or keep handy.

So you want to be, in my mind anyway--maybe you don't want to, I want you to--be an evangelist for your profession. You want to spread the word, you want to educate and make a difference in the world; and so sharing new material--useful material--for the people in your niche.

What are your top 10 tips? What are the five secrets that people need to know? What are the articles, books, cds, what is a mini-poster that you can put in people's hands that, if they were to read this, it would make a difference in their lives. And that becomes a door opener that's a form of a gift. But it's a very, very specific gift. It is sharing useful material. You're evangelizing, you're spreading the word, you're informing, you're educating, you're making a difference in people's lives. That's a way of getting in the door. It's a great door opener.

Strategy number eight of our door openers, is offering to solve a problem that they have. It's offering to be of service. Let's say that I knew that the hospital had a new moms group, and that the social worker had the job of booking a speaker every week. It would be offering to help solve a problem that she has to contact her and offer my services as a speaker. I didn't know that; it was totally news to me. But with a little bit of research, a little bit of thinking... There's common problems that all professionals have. We all need resources and referral sources for specific things that come up in our work with our clients.

One of the things that I found that the family law attorneys have: they all have the problem of what to do with ambivalent clients. Clients that they want to get divorced one minute, they don't want to get divorced the next. They think a settlement is fair one minute, they think its taking advantage of the next. They're just ambivalent! And the attorney wants to do a good job, wants to help the client get what they need out of the situation. And oftentimes they see that the client needs a therapist, or a counselor, or a coach to help them go through this arduous process, so they can help that client help themselves. It just drove attorneys crazy when the client wasn't totally on board, and they were ambivalent, and they had a hard time following through.

So if you can identify a problem that your potential referral sources have, then you offer to solve it, you become a hero! One of the problems I discovered that churches have, is, all churches have singles in their organization and they want to help them in some way. Usually it comes in the form of a singles group. Most singles groups, they ebb and they flow.

They go good for a while, and then things drop off. Then some energy gets put together, some leadership gets in place, they go good for a while, and then they drop off. In talking with ministers, I've found almost universally, the problem they have is that their singles group is not what it could be.

If you're a relationship coach wanting to work with singles in your area, this is a gold mine! Now, monetizing it another issue. There's strategies of doing that. We talk about that within relationship coaching institute. But, getting in the door by offering to help the ministers with their singles group is easy.

Sometimes you can identify these problems in the course of the conversation when you're connecting with potential referral sources. Then, that would be a great way to build a relationship. To be of service, to offer to solve this problem or help them solve it. But, it wouldn't be a door opener.

It is a possible door opener if you know what problems a potential referral source has, and can offer to solve it. It doesn't mean giving away your services forever. It might mean a complimentary session, it might mean a couple of consultations. It might mean collaborating on something.

But remember, a referral source is gold. They don't just represent just one referral, they represent an ongoing pipe line of potential referrals. So, whatever it takes to build that relationship is absolutely worth it.

So those are eight strategies for getting in the door of referral sources. What I call, door openers.

Woman 1: When you do a complimentary, let's say you're doing a workshop or something and it's a teleclass. If you do a complimentary gift certificate or coupon, do you put the actual phone number of the teleclass on there, or do you have them sign up with you so that you can collect their information?

David: I typically manually sign them up. I don't expect them to do anything. If I'm comping them, I will manually add them to the system. With their permission, of course.

Woman 1: So let's say I give some coupons to one of my clients to give to other people, and they give those out. So would the people contact me once they received them from my client? Or do they just go directly to the call?

David: Well, generally, you want to have a relationship. You want to have some engagement first. It could be as easy as sending you an email requesting the access information. It could be having a discount code that they put in on a website.

That's a little different from a private practice professional getting clients and seeing people in person, but it still applies. Generally you want to have some contact with somebody who's being comped. When I passed out gift certificates for the Friday night social, I had people showing up at the door with these gift certificates.

I felt good about it, knowing that my referral sources were passing them around. And, here they are, they're showing up! It's like a boomerang device. I sent them out, and they came back to me.

And they don't just come in the door anonymously. They come in the door. They show the gift certificate. They sign in like everybody else. The difference is, they're not paying. That's the engagement right there. You don't want to have no engagement. You're just skipping the payment part. That's all.

Woman 1: OK. That's the part that I was somewhat challenged with. Since it is by phone, so there isn't that face to face contact. Having them just call a number that I have on the coupon wouldn't be a good idea because I wouldn't have any way of even knowing they were on the call, for that matter. Or who they are.

David: Right. You want to make it clear what you want them to do.

Woman 1: Got it.

David: Yes. Great question. Thank you.

Woman 2: I have often called complementary professionals, seeking help for my clients and such. But my problem is in the reciprocity component of it. I'll call a therapist or a psychiatrist because I'm interested in them for a client and what have you, have a conversation and all, learn about them.

But then, they don't ask about me and what I've done in the past is often, sent them a thank you letter, acknowledging their help and so forth. But I had also been told that it was pretty tacky to put your business card in with that, so I didn't. Although, it just occurred to me that writing it on the stationary would probably resolve that problem.

But anyway, so I'm not exactly sure what my question is. Well, maybe how to encourage that reciprocity of interest.

David Steele: OK, what kind of reciprocity would you like?

Woman 1: Well, I would love them to be like: "Oh! What do you do? Tell me about that".

David: OK, and what we're talking about here is door openers to "grease the skids" to getting a meeting or a contact with the potential referral source. So, am I hearing that you're providing the door opener but it's not resulting in a connection?

Woman 1: Yeah, resulting in a connection not on my end and that here I learn about this person and I know that I can refer to them but I don't key in the other side of the connection.

David: Oh, OK. In terms of them referring to you?

Woman 1: Yeah.

David: OK. Well, referral relationships are built. It starts with the connection and you want to follow up the connection. That's actually what we're going to be talking about next, you might guess. And following up, that's very important. So, getting the connection is the first step. That's the most important step. And you would never expect somebody to trust you on the first date or the first day or the first week or the first month.

You would expect, realistically, to build a relationship over time. That can be as simple as sending them a Christmas card, sending them a CD, inviting them to lunch, dropping by their office and dropping off a book, sending them a client every now and then and not expecting anything in return. At first, people are sometimes suspicious. Whoa, why is this person doing this? What's their motive?

As they see you showing up and being of service and being authentic, then they come to relax and they come to know you, like you and trust you. This process can take time. But there's no hurry, you don't expect immediate gratification. You're not going anywhere and you do expect to follow-up prospects and follow-up referral sources. The fortune is in the follow-up, you realize that. So, in the beginning, don't worry about the lack of reciprocity because you are either not on their radar screen yet or you are on probation. You are being auditioned. You are on their radar screen but they're kind of looking at you and saying: "Who is this person? Can I trust this person?"

It might even be that they don't even know enough yet. Yes, they know that you are a X, Y, Z type of professional but they don't see the fit yet. They don't understand enough about who you are and what you do and how you can benefit their clients. So sometimes, that educational process requires time as well. So, relationships are an ongoing process and building a referral source is about building relationships and it all starts at getting in the door.

Now, once you're in the door then you can follow-up and build the relationship and we're going to talk about that next. I mean, if you can't get in the door, if you can't make that initial connection, then you're not going anywhere. Generally, making initial connection is not too hard. The door opener will grease the skids and make it easier.

So, turning to page six in your study guide: "How to keep your name in front of referral sources with strategic follow-up". Ten strategies for you, and as we were talking about, relationships are an ongoing process. You build them over time. You will need to follow-up with your referral sources for them to go anywhere. Hopefully, you're not expecting to just make a phone call and then end up having an endless stream of referrals. It's an ongoing follow-up process. So, 10 strategies for following up.

The first is tracking. And I have a client tracking form for you that I'd like to go over with you. If you downloaded it, you can open it up now. If you haven't downloaded it you can get it from the module home page, or use the link on the study guide.

The client tracking form, it's a pretty simple form. Again, you've got columns across the top. The first column is where you put the prospect's or client's name. Every time you get a referral, every time you get somebody contacting you about your services, you enter their name. And then you indicate: are they somebody brand new to your system, or have they contacted you in the past? Are they already in your database somewhere? And then, if you make an appointment, has the appointment been kept?

You want to keep track of that because there are a lot of people that you'll end up having on this list that you'll never have actually met, you'll never have made an appointment with; it hasn't gotten that far. And those are your prospects that you want to follow through with.

And then, next column is the source code. Take a look at the bottom of the form. The source code is where you track where they came from. And there's some generic source codes, like professional referral, client referral, website, newsletter. And then there's some blank spaces. So, go ahead and add as many as you need to, and use these codes to track where they come from.

And if you know anything about tracking, and you know the principle that whatever you pay attention to grows, there's something about tracking that really allows you to notice what's working, notice what's not working, and be able to do something about it, quite easily.

So, it might seem a little cumbersome. It's a little bit of extra paperwork. But tracking is very, very well worth it. It will help you follow up with your referral sources, identify what's working, identify what's not working, pretty easily identify what to do about it. So the source code is an important tracking tool for you.

And then, the reason for the visit. And this is another great thing to track, which is why people contact you. What is their stated reason or purpose or problem? What is the the thing that people usually contact you for? What are they saying? And you might have your own idea of what you offer and who you help and how you help them and why they would come to you, but you've got to track the reality, and then you get to decide what it means and what to do about it.

The next column is fees collected. If you use this form religiously and you track what you're earning from each of these folks, it makes it easy to figure out your case size and keep track of your earnings. Your case size is the average amount that each client represents.

If you were to add up all your clients, all your billable hours, in a week, a month, or a year, and you were to divide that into the amount of money that you made from those billable hours, those clients, you would get your case size. And case size is important because, whatever it is, you always want to grow your case size; you want to make more money per client.

If you do the math and each client represents, on average $1, 000, your goal for the next year is to have that be 1, 100 or 1, 200 or 1, 500 or 2, 000. You won't know if your business development is working for you or not unless you are able to track your case size, because the way to a successful practice, and the way to financial success, is to be leveraging your time and your efforts and to be making more per customer, or client, in this case. So, fees collected is just an easy way to be able to track your case size.

And then, the last column is follow-up comments: whatever you want to remember about them. I strongly suggest that you make a bunch of copies of this form and use it to track everybody that contacts you about your services, and that will allow you to identify people to follow up with that haven't hired you yet. It will allow you to track why people are coming, where they're coming from, how much money you're making from them. It's a great tool. I strongly urge you to track. And this is what I suggest you track and how I suggest you track it.

Strategy number two of how to keep your name in front of referral sources and follow up is to follow up with door openers as thank yous. All the door openers we talked about just a little while ago, most of them make great thank you presents. It's wonderful to acknowledge when somebody sends you a referral. You don't take it lightly. You don't take it for granted.

And so, taking a look at the list--the gifts, like books, gift certificates, calendars, mugs, the joint venture proposal--say, "Hi! You've sent me three clients this month. Wow! Maybe a lot of people in your practice would really benefit from us getting together and doing a seminar for them. What do you think?" So, the complimentary service, the gift certificates, the coupons, the sharing the material for people in your niche, offering to solve a problem they have.

When people send you a referral you want to provide reinforcement--reinforcement in the form of a gift, as a thank you, as an acknowledgment, for every single referral. It doesn't mean you have to send a gift for every referral, but you want to acknowledge each referral. And in behavioral terms, a reinforcement is anything that increases the likelihood that a particular behavior would occur.

So, what can you do, what can you say, to increase the likelihood that they will continue to refer? Once a referral is made, then it's all downhill. You just want to keep them referring. That's the easy part. But it's not going to happen by itself; you need to follow up. And an easy way to follow up is by following up with your door openers as thank yous.

Strategy number three is to use your effortless referrals grid. We covered the grid and what it is and how to use it, and you can use that to keep your referral sources in front of you. Have a system, a routine, of following up with them, proposing getting together, calling on the phone, sending an email.

Have a special place on your desk for your effortless referrals grid--a stack of them. Hopefully, you have lots of copies. There'll be lots of names on them. Flip through them every now and then. Say, "Ooh, it's been a while since I talked to that person. Ooh, I haven't got a referral from that person in a year." Then have another place on your desk for your client tracking form. These are things that you want out all the time.

Strategy number four is to schedule campaigns in your practice-building calendar. We covered the practice-building calendar, this is also something you download from our Private Practice Marketing Secrets member area. It allows you to schedule things months ahead of time and see the big picture.

In my mind, a campaign is a systematic marketing activity. And you can have a number of campaigns. You can have a campaign of following up with your referral sources, or generating new referral sources every March. "Every March is referral-source month!"

And in January, you might have a campaign of “prospecting month,” that you will follow up with every prospect that hasn't hired you yet that's been contacting you throughout the previous year. In January, might be the time where they’re most likely to be receptive to getting started working with you. Maybe, maybe not. I'm just making it up. It's an example of a campaign.

So you're going to spend the month of January following up with all the prospects that haven't hired you yet. And then there's the “Back to School” campaign and the “Thanksgiving” campaign.

So, you schedule campaigns in your practice building calendar. A campaign might be as simple as you do an intro every other month. You do a seminar, a free seminar, for anybody that will come. And you provide great value.

And that's a way to attract new people. It's a way to keep in touch with people who have already caught your act. They're interested, they haven't hired you yet. So, prior to each seminar, you market it. You announce it. It's a campaign to get people in the door for that seminar. Then you conduct the seminar and then you follow up the seminar with enrollment. Two months later you do it again. And two months later you do it again. Two months later you do it again.

That might be all you need to do to market your practice. So, a campaign is a systematic marketing activity. Go ahead and schedule a number of them throughout the year. With an eye towards creating a system. This is something that you want to do year, after year, after year.

One campaign that I have is, The Conscious Dating Success Story of the Year contest. Every year around January, I am going to start beating the drum, soliciting success stories. Around Valentine's Day is when the winners are going to be announced, Ipods are going to be given away.

We're going to have a conference call featuring the winners. It's an example of a campaign. It's designed to reach people who don't know me yet. To keep me in front of the people who do know me. To generate some excitement and buzz about conscious dating for singles.

It's a campaign. Design your campaigns. What different kinds of campaigns would you, could you, be doing during the year. Then plug them into your practice building calendar. Then launch them and make them part of your routine. Repeat the campaigns.

The fun part about it for me is being creative about these campaigns. The hard part is doing a campaign for the first time. Because you're thinking of everything that needs to be in place. Everything you need to do from scratch. But, the first time you do it, you learn a lot.

You learn about how to do it better the next time. You do it the next time. It becomes a whole lot easier the next time. You learn about things that make it even more effective the following time. The first time is always more labor intensive. You're creating something from scratch.

But after that you're building on the momentum and your experience and what you've learned from your previous campaigns. If your referral sources know that you have these campaigns, and they get used to your routine. Say, “oh yes, you know, every September so and so has a Back to School campaign.”

During the summer I'm going to be telling my clients about his Back to School campaign. Well, you might really consider working with so and so. He has a big event he does around September just before school starts.

So your network and your referral sources become educated and they get used to your campaigns and it becomes something else to talk to others about. “Oh, yes, so and so does a seminar every other month. You just missed one, but the next one's coming up in two months.”

You do these kinds of things, it becomes easy to refer to you. And, you do want to make it easy to refer to you, right? So, strategy number five of how to keep your name in front of sources, is, my favorite question. It's two words: “what's next.” This is my secret to creating a system.

This is my secret to creativity and follow up. “What's next?” So, OK, I met this person at a networking brunch. I got their card. What's next? OK. I'm going to call them and invite them to coffee. We have coffee. What's next? We're going to do a joint venture together, a seminar for the people in both of our networks. After that, what's next? There's always a "What's next?" And it's the secret to creating a system. It's the secret to following up.

And the answer is going to change in every situation, every time. So you don't have to know the answer ahead of time. You don't have to have it pre-planned months and years ahead of time; although, you could try. Chances are, when you get there and you ask yourself, "What's next?" you're going to come up with the most creative, the most appropriate answer for that situation, in that context.

And if it would help you, I would recommend writing these words, "What's next?" on a sticky note, and putting it up by your computer to remind you to ask yourself this question all the time. It's just one of the best strategies that I've found, personally, to help me follow up.

Strategy number six, I already mentioned. Remember that seminar I paid $800 for, and I learned three things? How to write a Yellow Page ad, asking for referrals, and lunch a month.

So, strategy number six is lunch a month. And I'll pass along this wisdom that I paid $800 for, which is, at the very least, if you do nothing else, have the goal of having at least one lunch a month with a potential referral source. And in the phone calls and contacts that you make to generate that one lunch a month, that might be all you need in terms of building your referral systems. I mean, it's a minimum. I want you to do more than the minimum, but this is the bare minimum: lunch a month.

Strategy number seven of how to keep your name in front of referral sources is: close the loop. Always, always close the loop. If somebody makes a referral to you, and that referral has contacted you, let them know. "I was contacted by so-and-so. Thanks for the referral. We have an appointment coming up." When that person makes the appointment, they actually meet with you, let your referral source know: "I met with so-and-so. We had a very good first meeting."

Your referral sources need the loop closed--not necessarily consciously. Chances are, they're busy, and, out of sight, out of mind. They're not going to think about it. But over time, it's going to start bugging them unconsciously: "Whatever happened to so-and-so? Well, I made a referral. Did they make an appointment? Keep the appointment? What ended up happening?" And this is relevant, not only for when a referral sources makes a referral and you're following up with that referral; it's relevant for everything.

So, let's say you have an email exchange with a referral source, and you're trying to set up a meeting, and you suggest a certain time and day. They respond back: "Well, that won't work. What about this?" Don't just let it sit. Don't just let it fall down in priority order in your inbox, and then forget to get back. Always prioritize closing the loop and getting back with people.

And if you don't hear from them, you send them an email and say, "Well, what about this?" And you don't hear from them, then you follow up. You close the loop. You take responsibility. Part of being an effective marketer and relationship-builder is following up these kinds of contacts.

And you've got to keep track of them. So, whatever system you need to use: a contact manager, sticky notes, your organizer. What I do is I write them down on my calendar. I have a PDA. I have a Treo, actually, and it has my PDA in it, and any time I need to do a follow-up action in the future, I will write it down in my PDA. And on the day that it's needed, it pops up on my PDA and I say, “yup! I have to do that!” So that's my little system. So, always close the loop, and have a system for reminding yourself to close the loop. Never rely on somebody else to remind you or trigger closing the loop happening.

Strategy number eight is, thank you notes and postcards. A handwritten note, thanking somebody for a referral, or giving them important information that they might need about the referral.

Remember, I mentioned, so and so, we had our first meeting? Thanks for the referral. It went very well. We think we're going to be working together very well. Or, so and so and I had our first meeting. That pretty much is all they're going to need. We'll be working together from here.

You don't have to break confidentiality. You're just confirming the results of the referral. And, a handwritten note to do so is classy and effective. People get it and they appreciate that you've taken time out of your day to write them a personal note. An easy way to do this is to have postcards printed up.

Personal postcards. They can have your photo on it, or your logo. It has your return address on it. You have a bunch of them printed up. Your personal, practice postcards. Then you can have a stack of them on your desk and at the drop of a hat, you can write a short note.

You can even do this while on the phone and stick a stamp on it and pop it in the mail. No effort at all. No time at all. And, very, very effective. Postcards are neat because they don't have to be opened. They always get looked at. They always get read.

A note in an envelope, somebody's got to open it, and unfold it, and read it. If it's hand addressed, it's much more likely to be open and read. If it looks like bulk mail, it's much more likely to be thrown away.

A very, very effective way to keep your name in front of referral sources and follow up with them, is with thank you notes and postcards. I am especially in love with the idea of postcards.

Strategy number nine is, the R&D team. In the old days, like ten years ago, on the Internet, and one of my mentors, Thomas Leonard, he loved the idea of the R&D team and developing your business with the support of the network. It's a great concept, a great idea. It was a bit overdone for a while.

You don't really hear about R&D teams anymore. You hear about R&D in corporations. But, the concept of an R&D team is, the people that are in your network, the people that you have relationships with, and your referral sources are people that you have relationships with. Then you consider them part of your R&D team.

You want their feedback. You want their ideas on how you can better serve them and their clients. You consider them members of your R&D team. You don't even need to invite them. Thomas Leonard's idea of the R&D team was putting together a Yahoo group and inviting people to join it.

Then having conference calls and making a mastermind group out of it. You don't even have to invite them. You don't have to ask them permission. You just consider them part of your R&D team. You want to have a successful practice in your area of expertise for the people in your niche.

They are the people that are in a position to help you do that. Not only by steering referrals your way, but they know a lot about the needs of the people in your practice. And what would make them happy, what would they feel good about referring to you for.

What do they know about the people in your niche that you need to know about? Two heads are better than one. You need this information. Market research is a great way to get it. This is an ongoing form of market research.

So when you take your referral sources to lunch, or you re-connect with them, start up this conversation again and again and again. You can check in with them about their business, and how it's going.

Also ask the question, How am I doing? When you refer somebody to me, what feedback do you get? What can I be doing differently? What can I be doing better? You don't have to know the answers to those questions to ask the question. You don't even have to know that they have any idea. But, when you ask the question, it might stimulate something.

"Well, no. You're great. You're wonderful. You do such a good job with the people that I refer. I can't think of anything. But, you know, there is this. Have you ever thought about this?" Those things are gold.

So you can reconnect and follow up with your referral sources, even your potential referral sources, by treating them as members of your R and D team and picking their brains and asking them for their feedback and their ideas on how you can do a good job, a better job, of serving the people in your niche, the people that they care about, the people that they're in a position to refer to you.

And the last strategy I have for you today, strategy number 10 of how to keep your name in front of referral sources, is a newsletter. We know we need a newsletter. Some of us groan and moan about it and say, "Oh, I don't want to do it. It's just a pain." A newsletter doesn't have to be a big deal.

And the content does not have to be original. You don't have to be a writer, an author, and come up with brilliant stuff every time. You're just putting together useful tidbits and tips, maybe that you collect from the Internet and other article banks, maybe that you quote from books. Maybe you can even include a book review, since you have an area of expertise, and there's always books coming out in your area of expertise. Chances are, you're aware of them and you've read some.

So a newsletter provides value. A newsletter provides an ongoing way to keep in front of people. By itself, it's not going to get you any clients. It's not going to make you rich and famous. It's just a necessary piece.

And a newsletter can be an online ezine or it can be something that you print out and send in the mail. Chances are, for your referral sources, it might be worth it to have a hard copy, printed out and mailed newsletter. In fact, you can have a newsletter just for your referral sources. What a concept.

So, if you have an area of expertise--let's say, my old one was couples in crisis. And I have a bunch of referral sources, including attorneys and mediators and social workers and people that are in a position to identify and refer couples in crisis--even my colleagues. And I have a newsletter specializing in couples in crisis, and telling some stories or case studies and having some tips, and things like that.

And this is not for the couples in crisis. Couples in crisis are not going to subscribe to your newsletter or read a newsletter about couples in crisis. But the professionals that deal with couples in crisis might be very interested in this material. It's for them. It's for following up with referral sources and keeping my name in front of them.

And given that word of mouth referral is, by far, the most effective way that we get clients, this might be all that you need to do for your marketing activity. You don't need a website. You don't need to do speaking. You just build your referral sources and keep your name in front of them, and a newsletter is a great way to do that.

So that is how to keep your name in front of referral sources by following up. We talked about the client tracking form, talked about door-openers as thank yous, the effortless referrals grid, scheduling campaigns in your practice-building calendar, the "What's next?" question, the lunch a month, closing the loop, thank you notes and postcards, the R and D team, and the newsletter.

Woman 1: I just had a question about the postcards. Do you have any source, or do you use postcards at all, or know a good source for mailing those out or anything like that?

Woman 2: This stuff they're doing online, I've seen some things promoted for using postcards like that.

David: There is a company that's very aggressively marketing nowadays, and I think it's sendoutcards.com. It's a great concept. And the concept is that, online, you can create these cards, and they can be sent out, and it's effortless on your part, and it's great marketing and follow-up. I have a problem with that, though: that it’s not personal. As long as you're spending the money, as long as you're taking the time to input your client's data, for the addressing of it and all that, then hand write the note, for crying out loud.

So, I have no problem with Send Out Cards. I think it's a good idea. I think, to make it even more effective, have these cards on your desk. And a postcard is a lot less than a regular, first-class stamp, so get a bunch of postcard stamps. And it takes almost no time. I mean, how long does it take, after you get off the phone with a referral source, to write a little note saying, "Hey, great conversation. Thank you. I'll contact you next week, " and then, boom, pop it in the mail?

Woman 1: Yeah. And this question, I guess, maybe doesn't fit here, then, because I guess the vision that popped in my head was just sending out thank yous or keeping in touch and different things with big lists of people or clients or that kind of thing. So you're just talking about individually handwriting one at a time when you actually are...

David: Yeah. This is not about mass marketing. This isn't about sending out a campaign to everybody in your database; this is about personal follow-up. And when you're talking about referral sources, you want them to receive it, you want them to open it, you want them to read it, you want them to appreciate it. That's going to happen by personally writing something, not by some mass-produced campaign.

Woman 2: I can say that it really works. I have a real estate agent friend who, after every contact with me, sends me a personal note, handwritten. And who do you think gets the referrals the most out of all of my real estate friends? [laughs]

David: Absolutely. Absolutely.

When you have a stack of these on your desk, it's amazing how often it occurs to you to use it. Use it as a thank you after a conversation. There's many, many opportunities, but if they're not right on your desk in front of you, then you're not going to think about it. So, I'm asking you to devote some of your desktop real estate for your client...

Woman 2: [laughs]

David: You're laughing! For your client tracking form, for your effortless referrals grid. Your practice-building calendar, that can go on the wall.

And for a stack of these postcards: the postcards, you can have pre-printed. Go to a printer and design a postcard that's just for you and your practice. It has your brand, your logo, your image, whatever. But you're going to write personal notes on it. And get yourself a whole bunch of postcard stamps. Then the actual process of writing a little postcard and popping it in the mail, it'll be very, very quick.

Follow-up strategies: very, very, very, very important. I mean, you might as well not bother to start anything unless you're going to follow it up.

Woman 3: I do use the Send Out Cards, and you can have your own handwriting in them.

David: Yes.

Woman 3: They have a font that they use.

David: Right. It's generated by machine.

Woman 3: It is, yes.

Woman 2: Mm-hmm.

David: And it's pretty easy to see that it's generated by machine.

Woman 3: Uh-huh.

David: And it's better than nothing, absolutely.

Woman 3: Right.

David: But why do better than nothing when it'd be just as easy, and no more costly--in fact, even more cost effective--just to do a personal, written note from your desk? So, as far as leveraging your time, Send Out Cards is a good tool.

And, for example, if you have a product on your website, wouldn't it be nice that every time somebody buys the product, you send them a thank you card? Well, you can do that in person, from your desk. If you're talking about dozens or hundreds a month, it may be smarter to leverage your time by using a service like Send Out Cards.

When it comes to your referral sources, though, these are the people you want to treat like gold. You wouldn't send your mother a Send Out Card, hopefully. You wouldn't do this to your referral sources, either.

OK. So, let's move right along, because, on page seven of your study guide we have: how to create and take care of your champions.

Now, a champion is a referral source. But it's a special kind of referral source. This is somebody that loves you, thinks you're great, talks about you all the time, thinks that everybody should work with you--champions you.

You never know. Some referral sources, they're just going to be referral sources. Others, based on the feedback they've gotten about you, based on their personal connection with you, they just fall in love with you, they just think you're great, they just think the whole world should know about you. They think you should go on Oprah, they think everybody should work with you. So, you never know who's going to be a champion or become one.

Let's talk about some strategies to create and take care of champions. So, five strategies here, very, very simple. The first is make sure you follow-up with a "thank you" for each referral. We talked about this and it sounds simple and it is simple. It's not necessarily easy to do this in a disciplined fashion all the time, but referral sources definitely notice it and appreciate it.

And given that you're probably not the only person they refer to. You definitely stand out if you're the only one that consistently thanks them for every single referral. Remember the reinforcement principle, is that if they are being reinforced for every referral, then it increases the likelihood that they will continue to refer.

So definitely, follow-up with a "thank you" for each referral. That will help them feel appreciated, important, you don't take them for granted and that, by itself, might create a champion. Like, you're the "go to" person, they just love you. I mean, all these other people that they refer to, they never hear from again.

Strategy number two is continue to ask for referrals. My, my, my... Just because you have a pipeline, just because your referral is referring to you, a referral source is referring to you, it doesn't mean that you stop asking. It's sort of like you don't take them for granted and you continue to thank them. You also continue to ask for referrals. And asking for a referral means that you're going to initiate conversation, right?

So, you're not going to just call up and say: "Hey Sally, got any more referrals for me?" You're going to "connect" with your referral sources and in the process of asking for referrals.

So, the great way to create and take care of your champions is to continue to follow through and connect with them and continue to ask for the referrals. If they like you and they think that people benefit from working with you, they will want to do so. It's nice to have that reminder, it's nice to know that you don't take them for granted.

Strategy number three is treat them as your inner circle. Like your R&D team, remember that concept. You treat them as if they are like your best friend, they are very important to you. And they are very important to you. So, for example, if it's Christmastime and you're going shopping for your family, guess what? You would go shopping for your referral sources too.

And you know enough about them because you have a personal relationship with them, of what they like. So, you know that so and so collects glass figurines of cows and you spot one, you're going to buy one for so and so. You treat them as your inner circle, as people that are very important to you. You keep them in mind when gift giving comes around or when holiday celebrations or gatherings. Send them a couple of movie tickets just for the heck of it.

Just because you saw a movie that you love, you thought that they would love it too. Send them a little note with some tickets. Treat them as if they are in your inner circle. Take them to lunch, pick their brains.

Strategy four is ask how you can reciprocate. Ask how you can help them. If somebody is referring people to you, that's nice. Don't take it for granted that that's all there needs to be about the relationship.

So, let them know you really appreciate their referral and you value the relationship. Is there anything that you can do in return? Any way that you can be of service? It's an open-ended question, it's a very honoring question. You're acknowledging their value to you and the value of the relationship. You don't need to know the answer to ahead of time.

"Hey! Is there anything I can do for you?"

They might say, "No, you're doing great. Thanks, very much!" Or "Well, thanks for asking. I'll keep that in mind." Or "Well, I'm moving this Saturday. Do you want to help me move?" [laughs]

A great way to build a relationship and bring them closer to ask them how to reciprocate, how you can help them.

The fifth strategy is to propose a JV or Tupperware party. A Tupperware party is a form of a joint venture. You have a referral source, they have been sending you referrals now and then, maybe a flood of referrals. These are the people that you can play larger with. Wouldn't it be nice to do a seminar for their network or do a Tupperware party. That will bring them closer to you, you closer to them. It will build a relationship. It will be a shared experience. That is how relationships are built. That is how champions are built, when you have these shared experiences are meaningful.

So if you were a marriage counselor like I was, one of your best referral sources is a family law attorney, and you are going to do a joint venture seminar on recovering from divorce or creating a amicable divorce or something like that. The attorney is going to present their stuff and their ideas. You are going to present your stuff and your ideas. Even if you only have two people in the room, you’re still having fun, you still have collaboration going on here. You are building a relationship with them.

So, those are five strategies for creating and taking care of your champions. There is not a lot of them, you don't need a lot of them. Just focus on these.

And that, ladies and gentleman, is everything I have for you today. My goal for you as a result of this module is that you get off the phone and you have strategies that you can implement right away. Once these referral relationships are in place, they bring you clients forever.

Woman 1: I really appreciate the information today and like I said, I feel it is just so doable for me. I'm excited about getting off the phone and start working on my strategy.

David: Outstanding! I love to hear that.

Friday, we will have our implementation lab. So, we will talk about any specific challenges and ideas for your specific practice.

Woman 2: Thank you. This is very, very helpful information.

David: You're welcome. This by itself is all you need. Everything else is gravy.

So four things I would like you to do when you get off of the phone: Choose your traditional strategies for getting your name in front of referral sources. Choose your non-traditional strategies for getting your name in front of referral sources. Create and construct, implement your plan for using these strategies. And, follow up! Keep your name in front of referral sources.

This is it! This is probably the most important thing, the easiest thing, the most effective thing that you can be doing to fill your practice. It is not going to fill today or tomorrow. It is sowing the seeds that you can harvest forever.

Woman 1: Thank you. This has been very, very enlightening. One of the things -- I've had so many things going on -- and this is something I don't need to wait around to do a website for. I have so many referrals and it's -- so many people I know. I can just pick up the phone and start this process. This will really, really jump start my business. Thanks a million!

David: Maybe the challenge for you is targeting the kind of clients you want to work with. So you might pick and choose your referral sources that you want to pursue and develop. Because not all of your referral sources are going to send you people you want to work with.

Woman 1: Right.

David: So when you've been in practice for awhile, sometimes weeds grow in the cracks every now and then. So you need to put some Roundup on those or cut them down. And grow the ones that are going to blossom into what you want.

Woman 1: OK. Thanks a million.

David: OK. I think we are done. I will see you Friday for our implementation lab. Between now and then, please do prioritize spending some time on designing your campaign for developing your referral sources and following up with them. We will talk more about that on Friday.

[End of transcript]