

## **Capstone Plus Training Module 4 Referrals and New Business**

### **Overview**

This is a business model that is more strongly suited towards your natural market. It's not impossible in the cold or cool market, however, the success rate is much greater working within your natural market.

### **Key Points**

- Always start with the people that you know who either own businesses or are in a C-Suite position at a company
- Focus on people that you know who know people who own businesses or are in the C-Suite
- Who do you know that I should know?

### **Maneuvering the Warm Natural Market**

- Understanding how to have conversations with your natural market about our program can sometimes be challenging
- Your only focus should be to get a meeting booked with your market director
- Pique interest and schedule the meeting
  
- Tactics in the Warm Market
  - o Asking a friend for "help"
    - When making small talk with your friend that owns a business or is in a C-suite position, subtly ask them how many employees at the company
    - Allow them to answer and say 1 of 2 things

1.

"100 employees! Wow! Hey, listen, if I could show you a way to save between \$40 and \$50,000/year in payroll taxes would you want to know about it? Great, when's a good time for you to jump on a 20–30-minute zoom call with one of the experts I can bring in?"

2.

“100 employees! Wow! Hey, listen, I just started on a new venture. I’d love for you to listen to it and tell me what you think. Can you spare 20-30 minutes to jump on a zoom with me and one of the experts on the program?”

### **Working through the Cold Market**

- This is where things get slightly more difficult
- The cold market is purely a numbers game
- Utilize these scripts below and it can potentially increase your chances for success in this market
  
- Phone Scripts
  - “Hello Mr./Mrs. Business owner, I came across your company and I have something I would love to share with you! I noticed you have around 100 employees and with my strategy, I can show you how to add an additional \$40-\$50,000/year back into your company in the form of tax savings. Let me know what you think, and we can get a 20–30-minute zoom call on the books!”
  - Hello Mr./Mrs. Business Owner, I just came across your company and found out you have about 100 employees! I have a strategy I could introduce to your company that will add about \$50,000/year back into your company in the form of payroll tax savings. When would be a good time for you and I to get on a 25 minute zoom call for me to show you exactly how I can do that?”
  
- Of course, these scripts can be slightly adjusted based off the company/individual you’re reaching out to. However, the biggest point is to say as little as possible to get the owner to a zoom meeting. The more you talk about the program in depth, the harder it will be for you to secure that meeting. Reason being, the employer will have a preconceived notion about the program based off the information you give them. By just speaking merely about the tax savings, you are raising the curiosity factor without saying words like, health insurance, benefits, wellness programs, etc.

## **Referrals**

- This is the secret to growing a large business in this industry
- Closing your first case offers you a lot of leverage for the simple reason that business owners, know other business owners
  - o Leverage your relationships to close your first case
  - o Leverage that relationship to create new business
- All types of financial services work well in the referral space because we are providing high value products/programs to individual/businesses and the people we help will want they people they know/care about to do the same things

## **Summary**

Though this program is not overly complicated, it can be tough to navigate and effectively roll out if you've never done it before. Leverage your market director (Andrew Cardi) throughout all stages to ensure that your business grows at the pace you desire. Utilize tactic with the clients you generate to create new business opportunities and allow yourself to fast track to the desired monthly income you'd like. There are very few businesses in the world that will allow you to earn monthly residual income to this capacity. Have a number in mind that you would like to earn, write it down. Write down all the people you know that own a business/C-suite position first. Then write down all people that you know who know people in the above categories. Go out there and make it happen!