Business Development Program
Introduction

This Business Development Program has been developed by CFL for you to apply to your clients and prospects. We want you to take the ideas and values that we have developed and use them to “differentiate” your company from your competition.

Review this very carefully. We will make changes you feel necessary, including adding your logo at the top.

Use this program as an interview process to learn all there is to know about your clients and prospects, including the many ways you never imagined you could assist them in marketing their practice.

You will be rewarded by being seen as “Value Added” to them, and creating “Referral Power” for you. Through this system you will find the true power of being a “Trusted Advisory” to your clients and Strategic Partners.

- Assist your prospects and clients by becoming a Facilitator for them.
- Become their trusted advisor through this process.
- They will become your Raving Fans because of this.

“They won’t keep you a secret”

{Your Logo/Company Name}

BUSINESS DEVELOPMENT PROGRAM

For CFL Members Only

{Your Logo/Company Name}

Date:__________________________ Location:_______________________________________

Group:____

Members Name:____

Firm Name:____

Address:____City:__________________________

State:____Zip:__________________________

Phone Number:___________________________ Fax #:_________________________________

E-Mail Address:____

# of Partners: ___________ # of Professionals __________ # of Staff______________

Name of Partners	Area of Expertise

What are your expectations from joining:

____
____
____

Our expectations are in alignment with yours. We also expect the following:

1. That you will come away with a workable Business Plan that outlines realistic goals for how your firm and ours will interact.
2. That we will set in motion the steps that will bring your firm into the Marketing/Networking arena.

By answering the following questions you will help us to evaluate your firm and provide suggestions on how to effectively take your marketing into your daily practice.

Referral Information

Who do you know that would benefit by being introduced to our firm?

In preparation for the Business Development Meeting, bring their names and contact information.

Name: ____

Address: ____

Phone#____

Email: ____

Name: ____

Address: ____

Phone#____

Email: ____

Name: ____

Address: ____

Phone#____

Email: ____

Name: ____

Address: ____

Phone#____

Email: ____

Name: ____

Address: ____

Phone#____

Email: ____

Client/Practice Information

1. How many clients does your firm represent? ______________________

2. Has your firm increased the number of clients over the past 12 months? ☐ Yes ☐ No
   If yes, please explain how this was accomplished:
   ____
   ____
   ____
   ____

3. If you were to profile 20% of your client base, what would they have in common?
   ____
   ____

Marketing

1. How do you currently communicate with your clients? (check as many that apply)

   ☐ Newsletters ☐ Regular Mail ☐ Personal Contact
   ☐ E-Mail ☐ Phone ☐ Other

   If you have a newsletter, what is the frequency?_________________
   Who prepares the newsletter:_________________________________

2. Do you believe you are good at getting referrals from your clients? ☐ Yes ☐ No

3. Do you believe you (firm) do a good job marketing? ☐ Yes ☐ No

4. Have you ever developed a detailed marketing plan for your business? ☐ Yes ☐ No
   (If yes, please provide a copy)
   If no, would you consider developing a detailed plan? ☐ Yes ☐ No

5. How many marketing approaches do you currently use? (check as many that apply)

   ☐ Newsletters ☐ Direct Mail ☐ Association
   ☐ Seminar ☐ Advertising ☐ Telemarketer
   ☐ Referral ☐ Networking ☐ Other___________

6. Do you currently use brochures to market your business? (If yes, please provide a copy)
   ☐ Yes ☐ No

7. Are you currently active in any professional business, marketing, networking or mastermind groups? ☐ Yes ☐ No
   If yes, name of group(s):____
   (e.g., Kiwanis, country club, chamber of commerce, associations)

8. Do you have a Bio? (If yes, please provide us with a copy) ☐ Yes ☐ No

9. Have you ever spoken at or conducted a seminar? ☐ Yes ☐ No
   If yes, provide details (e.g., where, when, why, with what group, etc.)
   ____
   ____
   ____

10. Would you be willing to conduct seminars if additional support was available to you? ☐ Yes ☐ No

11. Are you familiar with the seminar material that is available? ☐ Yes ☐ No

12. Would you be willing to conduct a seminar for your client, with one of our Partners? ☐ Yes ☐ No

13. If we develop a direct marketing program, do you have staff that can assist you in reaching your clients on a regular basis? ☐ Yes ☐ No

Who are your most trusted Advisors?

1. **Your CPA:**

   Name: ________________________________**Email:**________________________
   Telephone: ____

2. **Your Attorneys (Specialty):**

   Name: ________________________________**Email:**__________________________
   Telephone: ____

3. **Your CFP:**

   Name: ________________________________**Email:**__________________________
   Telephone:____

4. **Your Wealth Management Provider:**

   Name: ________________________________**Email:**__________________________
   Telephone:____

5. **Your Banker:**

   Name: ________________________________**Email:**__________________________
   Telephone:____

6. **Your Property &Casualty Provider:**

   Name: ________________________________**Email:**__________________________
   Telephone: ____

7. **Your Employee Benefits Provider:**

   Name: __________________________________**Email:**________________________
   Telephone: ____

8. **Your Mortgage Provider:**

   Name: __________________________________**Email:**_______________________
   Telephone: ____

NOTES

PEARLS OF WISDOM

"How To Make Your Relationships RAVING FANS"

1) STRATEGIC PARTNERS

- Work with them to increase their business/practice by giving them added value. Make introductions.
- Use your network as a tool to bring value to your Strategic Partners as well.

2) CROSS SELLING

- Within your Client Base "Cross Selling":
  Educate yourself on your Clients needs.
  Who do they need to meet to increase their opportunities?

- Look at your Client Base/Network Partners for an opportunity to assist that client. Be a Champion to both.
- Your rewards are the Endorsements, from both, that increase your opportunities. "Everybody WINS".

3) ENDORSEMENT LETTERS

- An important reward also is to request Endorsement Letters from your Clients. This letter states the Value you have brought to them.
- This creates the "Raving Fans" thought process.

4) MEDIA KITS

- Create Media Kits to be given at the end of a meeting, whether it be One/One or a Facilitated Networking Meeting.

  Include in the kit:
  - Your Bio
  - Your Companies Services/Products
  - Your Companies Mission Statement
  - Your Companies Awards
  - Your Endorsement Letters

- Let your "Raving Fans" tell the Market Place "Why You".

- Implement the Referral Program into your practice. This will enable you to receive 6 Endorsements from every client you presently have and all new clients and relationships you will garner in the future.

Request our Referral Program: a step by step system for Endorsements.

{Your Logo/Company Name}

FRUIT OF THE TREE

The **Fruit of the Tree** (attached) lists the 'fruit' from where we get our opportunities, broken down into the Top 3 per category.
Filling it out is just the first step so, what do you do with it once it's completed?

After completing the Tree, the next step is to look carefully at the true amount of opportunities you have received and the amount of opportunities to which you have exposed your clients. Analyze carefully the last time you had a face to face with each one.

The key is always constant contact, either face to face, through Newsletters, or just a friendly e-mail to see how they are doing.

Ask yourself "Am I doing enough to deserve these endorsements?" You don't want to be the person who sits back and believes that you deserve an opportunity that you didn't earn.

Creating these profit centers through your **Fruit of the Tree** is the beginning of taking your valuable time and "mine" where the sweetest Fruit is; **so "ripe' that the "juice" will continue to flow way past the time it is picked.**

Keep your relationships under control. Your time is valuable, and there are just so many Partners to work with.

When a person constantly joins Networking groups and goes to Networking Events, you become overwhelmed with business cards and handshakes. But where is the business?

Let's make it a simpler and more controlled environment.
BUILD your FRUIT of the Tree and then work to have your **Top 3** in each category, and make that **FRUIT always the Freshest**.

"Give vs. Get"

{Your Logo/Company Name}

FRUIT OF THE TREE

Sample List

Business LIST SPECIALTIES:
1. COI Attorneys
2. T&E's
3. IP's
4. Bankruptcy's
5. Elder Laws
6. CPA's
7. Life Insurance
8. P&C's
9. Employee Benefits
10. Estate Planning
11. Advertising
12. Real Estate
13. Mortgage Spec.
14. CFP's
15. Head Hunters
16. Graphic Artists
17. Furniture
18. Banking
19. Marketing
20. Telecommunication

Personal LIST SPECIALTIES:
1. Clients
2. Networking Ptnr
3. Referrals
4. Endorcements
5. Relatives
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
17.
18.
19.
20.

For CFL Members Only

FRUIT OF THE TREE

Use this chart to complete your list

Business LIST SPECIALTIES:
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
17.
18.
19.
20.

Personal LIST SPECIALTIES:
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
17.
18.
19.
20.

Your Preferred Provider Network

After analyzing your **Fruit of the Tree**, you should be able to choose the top 3 in each category. These 3 become your **Preferred Providers**. We know that the best way to choose a Provider for a client is to have a variety in a category, e.g., your 3 top Accounting Firms, to choose from.

This will give you the ability to resolve any issues a client has. You should match the client's needs and personality to, for example, a specific CPA firm.
That CPA firm becomes not only a Preferred Provider to your client, but a Strategic Partner to you.

If you develop 8 lines of professionals to work with (diagram attached) they all become referral sources to you.

We all know there is just so much business to be given out, so making 3 of a category gives you control of your Strategic Partners and your contact network.

Focus on these Strategic Partners.

- Learn their needs and the goal and objectives to be involved with each one.
- Schedule a breakfast meeting once a quarter to review each others needs and successes in the partnership. This is essential.
- Work to build a stronger relationship with each meeting. The more contact, the more face to face, the more the "pipe-line" continues to fill from each one.

"GIVE vs. GET"

Being in control of your **Preferred Provider Networker**, allows you to measure the amount of opportunities you're receiving from your Providers. When you notice you are "giving" and one of your Providers is not being pro-active for you, its time to sit down and review the relationship. Most times this awakens the Provider. If not, then its time to replace the Provider in their category with another preferred relationship.

In the diagram on the next page you will see that you are developing 24 profit centers – 3 preferred providers in each category. You can never know when one of these Profit Centers will bring an opportunity to you, but with Pipeline "filling" coming through 24 pipelines you will have constant activity.

The volume always stays flowing as long as there is ***follow-up, follow-up and follow-up.***

As a Pipeline Facilitator you must always be aware of what opportunities you are "***Giving***". You can never sit back and feel that the "flow" will never stop as you are also being measured by your "pro-activity".

The next step will be to learn how and what system you need to implement to have constant control of your "**Preferred Provider Network**".

{Your Logo/Company Name}

YOUR PREFERRED PROVIDER NETWORK

These are Businesses that a person utilizes for business. These businesses are your Preferred Provider Network and these businesses should be doing Business with you.

Sample Network

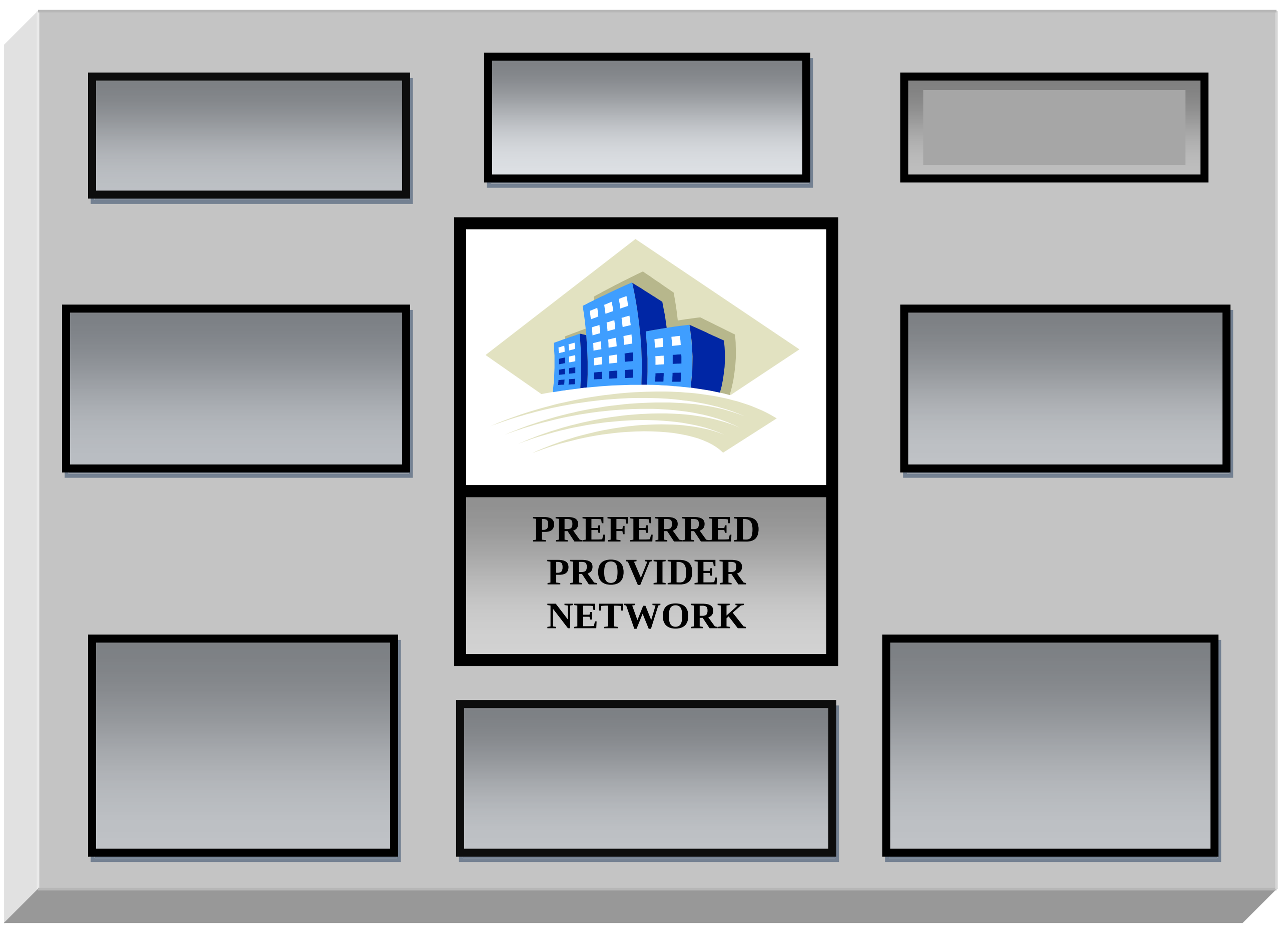
For CFL Members Only

{Your Logo/Company Name}

YOUR PREFERRED PROVIDER NETWORK

These are Businesses that a person utilizes for business. These businesses are your Preferred Provider Network and these businesses should be doing Business with you.

Now fill in your Preferred Provider Network:



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"YOUR PROSPECT TOWN"

The Key to this program is to develop a thought process of doing continuous business with the professionals with whom you do business.
Your "Fruit of the Tree," as well as your "Preferred Provider Network" should lead into this process.

We constantly do business in both our professional and private lives, without ever getting into a discussion of what we do and how we can be of service to them. For example, most of us never approach our own accountant (or attorney or financial provider, etc) with a conversation about how we can be of service to them and their clients. Wouldn't it be to our benefit to approach them just as we approach people in our networking groups or a social networking event?

We are constantly looking to establish new relationships and we should, but we are not looking in our own "Prospect Town". Places we visit daily or weekly; the restaurant that we frequent for years; aren't these opportunities we should be approaching?
It's about having a conversation so that these professionals really know who you are, as well as educating you on how you can be of service to them.

Personal Life	Professional Life
Your Accountant **Your Attorney** **Your Financial Services Representative** **Your Bankers** **Your Real Estate Representative** **Your Doctor** **Your Dentist**	**Attorneys** **Accountants** **Financial Services** **Banks** **Real Estate** **Networking Partners**

As you can see in the above sample charts, there are crossovers between ones' **"Prospect Town"** and professional life.

Take the time and approach your **"Prospect Town"** about doing business with them, since the relationship has been established through your frequency of being their client or customer.

Shouldn't you be doing business with people who do business with you? It is a way of creating our "**Give vs. Get"** in your personal life as well as our business life.

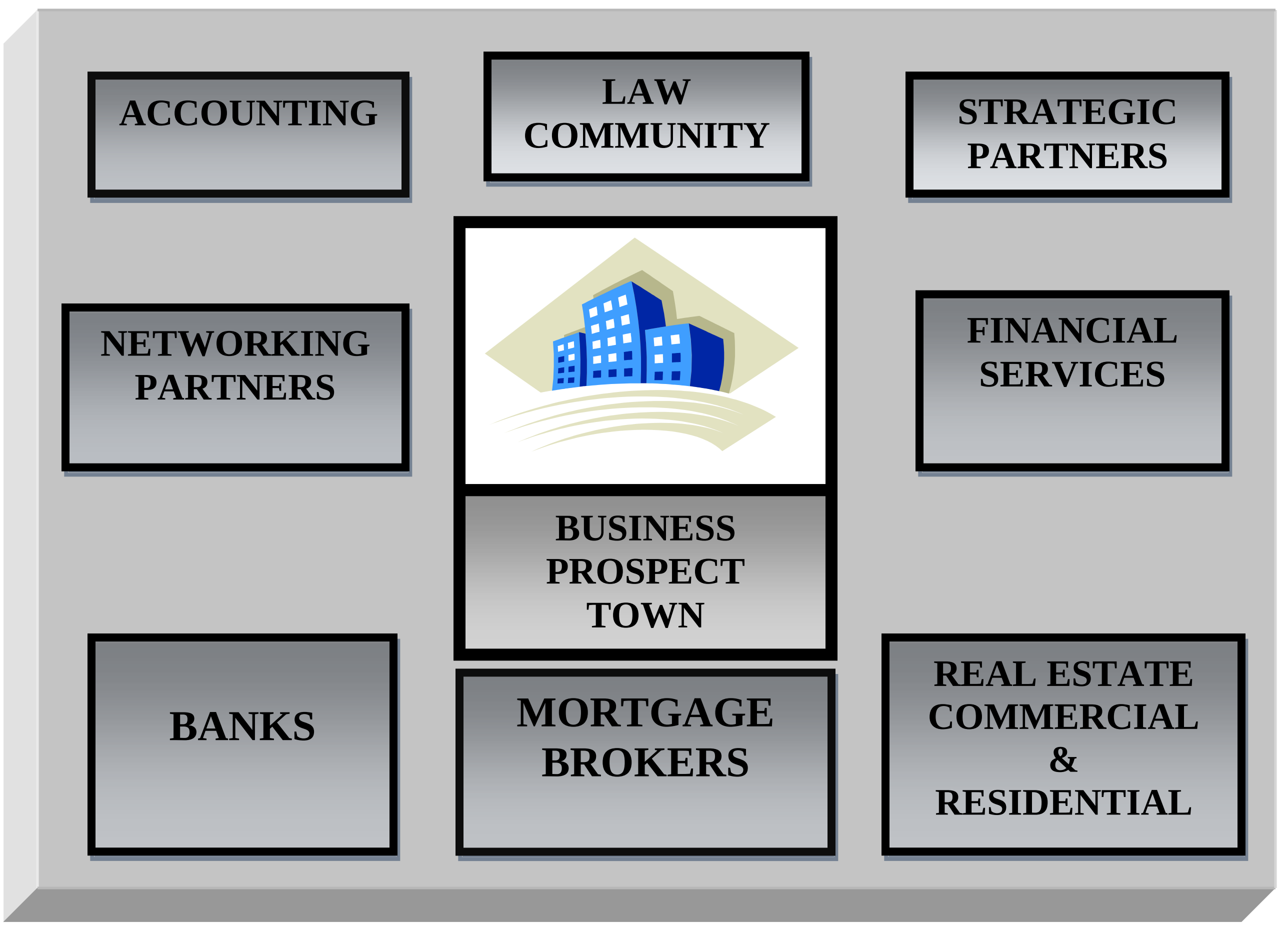
{Your Logo/Company Name}

"BUSINESS PROSPECT TOWN"

Can you Target and Create Business Community Momentum?

These are businesses that a person utilizes for business reasons.
These businesses are your Prospect Town and should be doing Business with you.

<u>Sample Business Prospect Town</u>



{Your Logo/Company Name}

"BUSINESS PROSPECT TOWN"

Can you Target and Create Business Community Momentum?

These are businesses that a person utilizes for business reasons.
These businesses are your Prospect Town and should be doing Business with you.

Now fill in your own Business Prospect Town.

For CFL Members Only

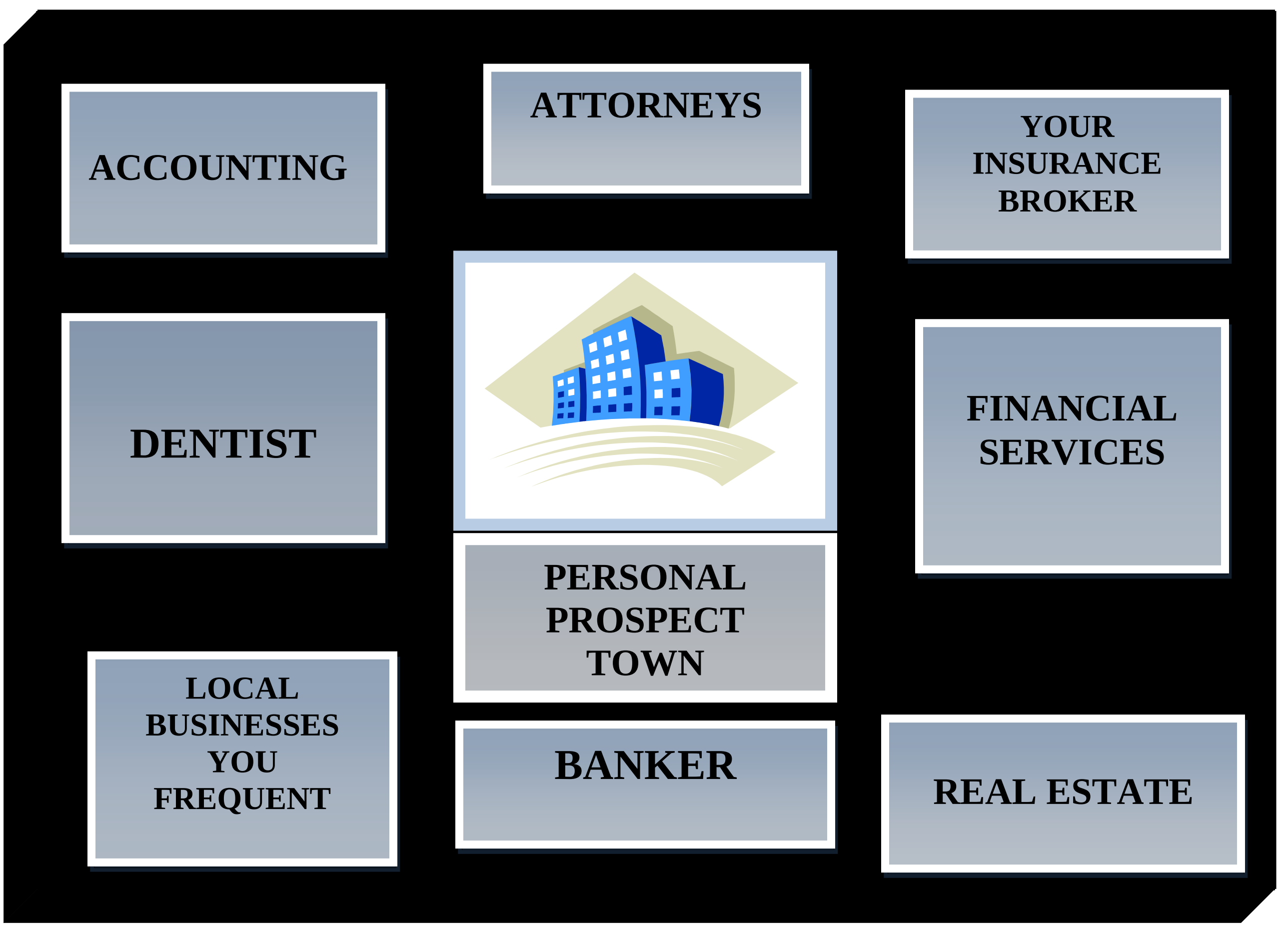
{Your Logo/Company Name}

"PERSONAL PROSPECT TOWN"

Can you Target and Create Business Community Momentum?

These are Businesses that a person utilizes personally.
These businesses are your Prospect Town and should be doing Business with you.

<u>Sample Personal Prospect Town</u>



For CFL Members Only

{Your Logo/Company Name}

“PERSONAL PROSPECT TOWN”

Can you Target and Create Business Community Momentum?

These are Businesses that a person utilizes personally.
These businesses are your Prospect Town and should be doing Business with you.

Now fill in your own Personal Prospect Town.

{Your Logo/Company Name}

10 BEST CLIENTS

10 Best Clients (Highest Volume Clients)

	CLIENT NAME	BUSINESS NAME	PHONE#	EMAIL
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

10 MOST APPROACHABLE CLIENTS

	CLIENT NAME	BUSINESS NAME	PHONE#	EMAIL
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Date_____________

List below the Centers of Influence you would need to meet to increase your practice.

6 MOST APPROACHABLE CENTERS OF INFLUENCE

	Referral	Company	Phone #	Email
1				
2				
3				
4				
5				
6				