

Scripts and Templates

Invitation for a Referral Party

Hi, [NAME],

I woke up thinking about you today because I was looking through my texts of a few of my contacts and I'm positive I could refer some high-quality clients to you.

Will you book a conversation on Zoom with me, because I have a powerful way to make some referrals?

I'll need to ask you a few questions so I can give you some right-fit people. And if you can think of some folks to refer to me, I'll make it super easy and do all the work for you.

Let me know, and I'll send over a link to book a conversation!

[YOUR NAME]

The General Template

Most intros I send end up being around a minute to a minute and a half. It's basically this:

- So-and-so, meet Justin. Justin, meet so-and-so.
- This is what Justin does.
- This is what so-and-so does.

- Then provide the context of ways they may be able to play together so when they do get on the phone, they're not sitting there trying to figure out why you're even talking to them.
- Drop in the calendar link.
- Ask for a follow-up ("Let me know how it goes.")

That's it!

The Outline

Here's a sample text template where you can fill in the blanks:

Justin Breen Swipe Template

Justin Breen - meet [NAME].

Justin Breen is a master connector who knows how to get media attention like nobody I've ever met. You'll love him.

Justin - about [NAME]. [FILL IN]

I thought I'd connect the two of you for a conversation. Collaboration opportunities.

LMK what happens after you connect.

Here's a version for me:

[NAME], meet Mike Koenigs.

You should know him. He's a marketing and business genius with a massive database.

He's built and sold 5 businesses of his own, worked with people like Tony Robbins, Darren Hardy, Brian Tracy, John Assaraf, and many other business leaders and founders.

He can help you launch a new business quickly, create new products, increase your sales, think bigger, create new marketing systems, and get your message out to a larger audience.

His email is Private@PaidForLife.com and phone is (858) 412-0858.

[YOUR NAME]

And another version...

[NAME], meet Mike Koenigs, the best Multiplier I know. You should know him. His email is Private@PaidForLife.com and phone is (858) 412-0858.

He's helped _____.

I'm certain he can help you _____.

[YOUR NAME]

Example For a General First-time Introduction:

Charles: “Hey, Charles here checking in with you. How are you doing? I’d love to connect you to my great friend, Mike Koenigs. Mike is a marketing legend. He’s consulted people like Tony Robbins. He’s in many groups with me, such as Genius Network and Flight Club. We send each other connections all the time. What he has done for the people I’ve sent his way... Number One, he’s super connected. He’s phenomenal at strategy. He helps with branding and really elevating the persona of a company along with helping them create far higher ticket offers. And in many cases, sell them before they’re even done making the thing. It’s pretty remarkable. And again, I’ve seen him do this several times with people I’ve personally referred over. Mike, want to say a few words?”

Mike: “Hey, thanks, Charles. Okay, so first of all it’s nice to meet you. I’m a big believer in “no homework” which means we meet and get stuff done quickly. I spend three days with the founder, like you. I’ve got a great place on the beach in La Jolla, California. So you come stay at my condo and we’ll either create a brand and offer or improve yours. We’ll build everything you need, and then spend some time in my studio. You’ll be in the other seat next to me, sitting there. I’m interviewing you and we create content, which can be a sales deck, a pitch, sales materials, video webinar, articles that we publish in *Entrepreneur*, *Forbes*, and *Fast Company* magazines, and I’ll feature you

on my podcast. But I've had people walk away and literally make a million dollars that same month with their clients. Michael Chu made \$1.2 million, and most recently Chuck Boyce closed a \$35 million deal from a business we invented in 3 days from scratch. And I say that not to brag, because it's not always about the money. Sometimes it's about elevating you and your brand, but either way, I'd love to connect and chat with you and see if I can help you out. And as usual, thanks a ton, Charles."

Charles: "My pleasure. So feel free to share your booking link with Mike, or Mike will send his your way and I will leave it to you two to connect. Happy connecting!"

Example For a Specific First-time Introduction:

Charles: "Hey Mike and Jackson, I'd love to connect you both. Mike Koenigs is a good friend of mine I've known for several years. He is an expert at building brands, creating high-ticket offers. Several clients I've sent him have done extraordinarily well from his work and advice. He's been in the game a while. He's consulted people like Tony Robbins; he's in the Genius Network and Flight Club. He's everywhere you want to be.

In any case, Mike, I'd love to introduce you to Jackson Milan, a great friend of mine and a client who has worked with me. He helps businesses scale by focusing on their core numbers and retaining more personal wealth so

they're just better at managing money. He runs a group program. He's a JV monster. He's done two million in revenue, just from joint ventures and cash-collected four million in backend. He and I share referrals all the time. I'd love for you to have a conversation."

Mike: "I'll make it super-easy. I'll make sure you get a link. Jackson, nice to meet you. And thank you, Charles. Well, the next step's yours, so I'll definitely get you a booking link, and I can't wait to go deep with you. Bye."

Example For a General Re-introduction:

Mike: "I want to introduce you to my friend Charles Byrd. He is one of the most connected JV experts I know. He's been a great connection for strategy and referrals for me personally, and also for everyone I've ever introduced him to. And one of the things he's really good at is helping you look at all your lead sources with endorsed joint ventures, although he thinks a lot bigger than that. He's added millions to some of my clients, and I know he is going to be able to do the same for you. So I think you've just got to connect with him because you're really going to like him. You'll be values-compatible and find other ways to work together. Charles, why don't you say a few things?"

Charles: "Mike, thanks so much. I'd love to connect, learn more about what you're up to and who

you serve and explore ways you can leverage endorsed joint venture traffic to scale that up. It basically diversifies your lead sources, in case you're dependent on something like Facebook ads. I've had many clients whose accounts have been shut down, or they're not able to scale past a certain point, so we help them diversify. It's a plug-and-play system to get up and going with your JV strategy, identifying ideal JV partners, and the whole system for snapping it in and getting it in production in less than five weeks. So if you'd like to chat about that, I'd love to chat with you. Feel free to share your booking link with me, or you can use mine."

Mike: "As soon as you've connected, tell me what's happened. Everyone always sends me the same message, which is, 'Charles is awesome. Thanks for the introduction.'" But I'd love to hear what you guys end up doing together. Okay, talk to you later. Thanks for watching. Bye."

Example For a Customized Re-introduction:

"Hey Ken, you already know Charles Byrd. You guys met through Joe Polish, and here's why I want to connect you guys again. Charles is exceptionally well-connected, and he's just got a massive database of JV connections. A few days ago, he introduced me to an

attorney that has an info product he wants to sell. Charles is the guy who can line him up with some joint venture traffic and partners to help him sell that. I think he can do the same for you.

Second, Will with Will at Work. I know he's looking for more traffic and more deals. I think Charles would be the guy to connect with Will as well, so I'm making this for both of you. Oh... I also think you should have Charles back on for a METAL International meeting where he can talk about JVs.

All right, Ken, I'll follow up this weekend. I love you, brother. Bye."

Example: Justin Breen

Here's a walk-through of part of a Referral Party, complete with videos:

1. Introductions

Text intro (create a swipe)

Hey [name]! How are you?

I'd like to introduce you to my good friend Justin Breen. He is a master storyteller and really good at helping you get your message out there.

I think you two ought to talk. Happy connecting :-)

[your name]

Email intro (create a swipe)

Sample Email Text:

Shawn - meet Justin Breen.

I just recorded a (really good) podcast interview with him that will be on Capability Amplifier soon BUT I wanted to connect the two of you.

Justin is a media master — he has a really unique and great way to get in the media, get attention, get on TV, and craft great stories.

I've already told Justin about you.

You should chat and see if there are some interesting ways to collaborate.

Mike

2. Create the video intro
 - i. ReferralParty.com/MeetJustinBreen
 - ii. ReferralParty.com/MeetMikeKoenigs
3. Look through text, email, contact database
4. Start sending...

Here's a text intro I sent for Justin:

iMessage
Mon, Jun 13, 4:35 PM

Justin Breen - meet Kane Minkus.
You'll love each other and Kane has
deals for you now.

Tue, Jun 14, 12:15 PM

Justin Breen

Awesome !!! Kane great to connect ...
here is booking link or let me know what
works for you !!!

[https://calendly.com/justinbreen/
connection-call](https://calendly.com/justinbreen/connection-call)

If you've taken Kolbe please send me
your score ... I'm 8671

JB

Also ILL!!! Both Illinois graduates !!

Kane Minkus

Lol I don't know where my Kolbe test
scores are but I'm a high quick Start I
remember that :)

KM

Justin Breen

Yep makes sense ... I am high quick
start and high follow through

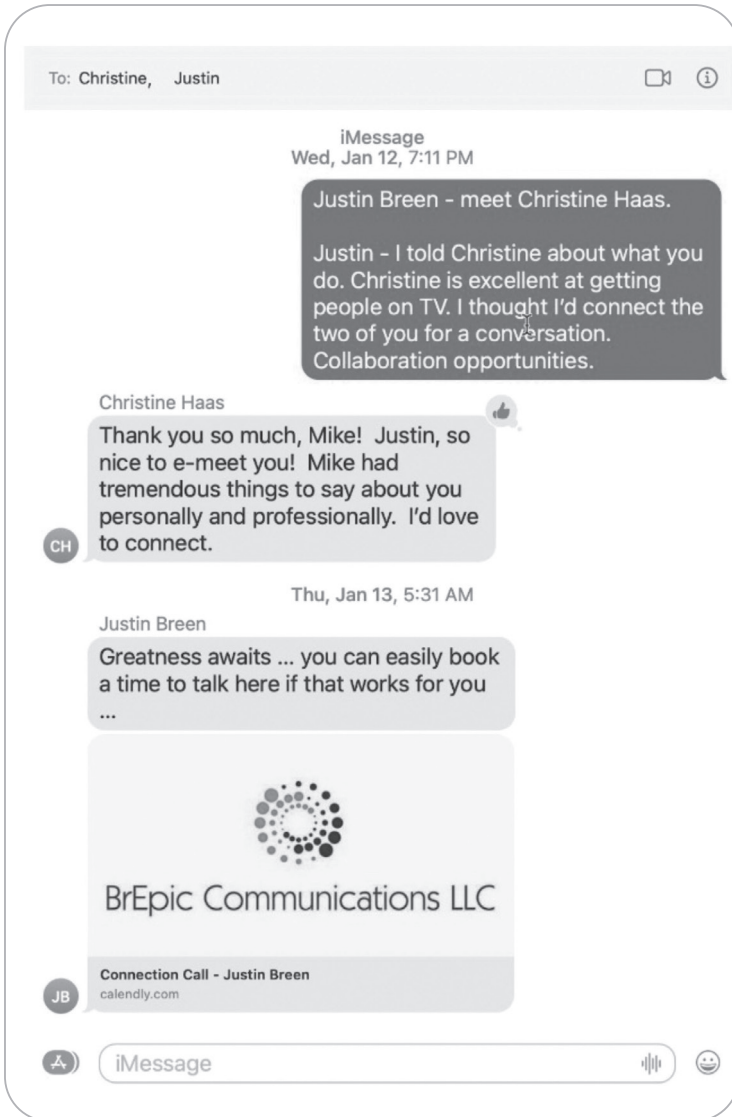
JB

Kane Minkus

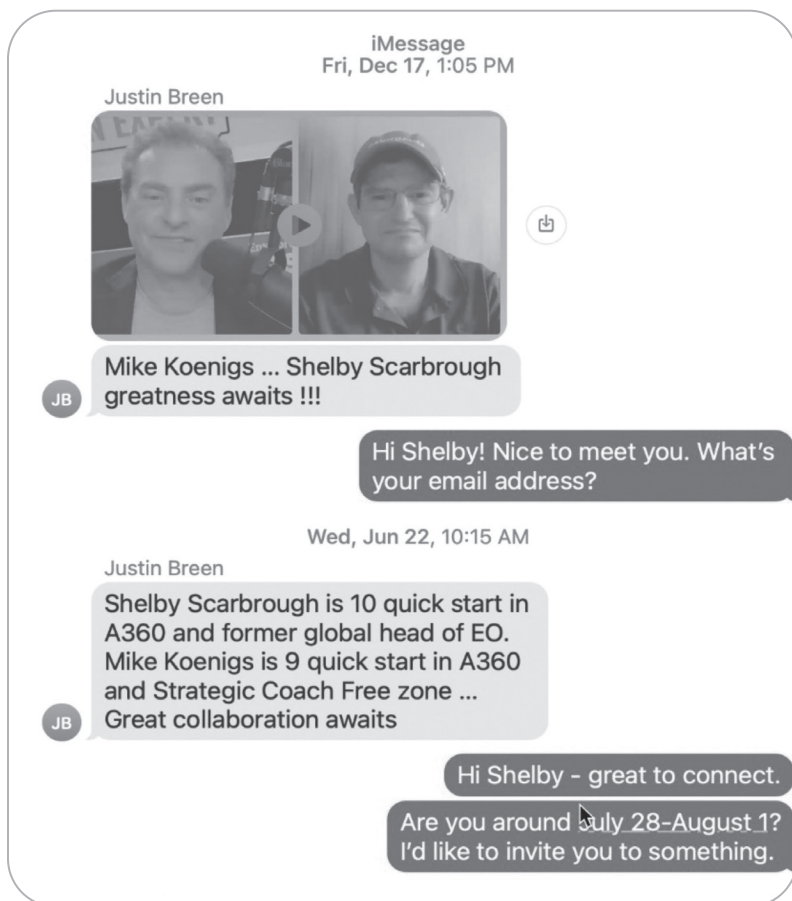
Nice!

Here's a video on us for some
background

And one more...



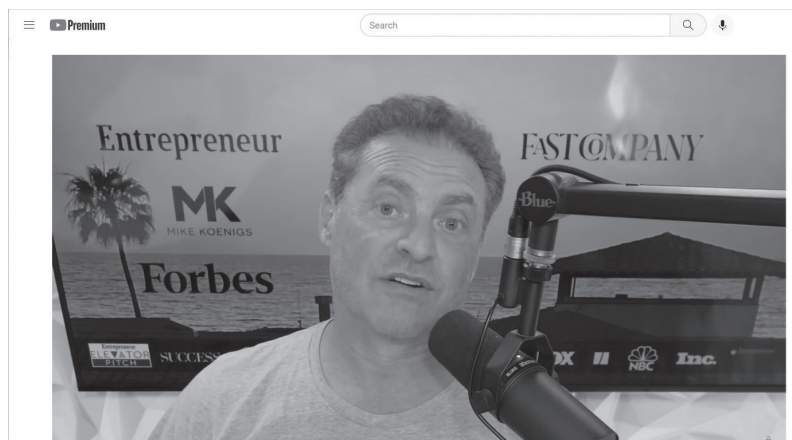
Here's a text intro Justin sent for me:



Example of One-Way Introductions

Here is a bunch of solo videos where I videoed short intros on behalf of a friend and client, Chuck Boyce. Read through or

watch and see how I adjusted the intro in each one, depending on the person I was introducing Chuck to. Click on the thumbnail or go to the URL to see the full video:



Watch this video at: ReferralParty.com/MeetChuck+Tom

Transcript:

Hey Chuck Boyce, meet Tom Lambotte.

I am putting you guys together because first of all, Chuck, Tom's the guy I told you about who can EOS-ify, systemize, and SOP-ize a business very, very quickly. His big promise is he will take a business and help the founder not have to run it, so it's a self-managing, self-running company.

He will also set up the SOPs to manage your business, and get it to generate recurring cash flow and recurring billing. His two businesses are self-running.

Now, Tom, Chuck Boyce is a guy that we created a business called DataMoo. They find very, very specific data — intent data, it's called first-party data — and supply that to an organization so they can target very specific clients on multiple channels.

Now here's what's important about this. When we met about 60 days ago, we invented the business. We created the deck, we created the pitch, and he just closed a \$35 million deal and the money came in. The first chunk of the money came in today!

So, the bottom line is he's got a huge success. Now he not only has his business that he wants to EOSify, be able to get out of the way and grow this thing to 100 million or more. He has other clients who can use your skills as well.

So have a conversation. You're officially introduced and can't wait to hear what comes out of this. And Tom, I will be talking to you next Friday. Chuck, we're gonna see each other in a couple of weeks. Good luck.



Watch this video at: ReferralParty.com/MeetCallCenter

Transcript:

Hey guys. This is Chuck Boyce and Gil and Andrew. Chuck, Gil and Andrew have the Tijuana call center that I told you about. For Chuck and Andrew, I mean rather Gil and Andrew, Chuck Boyce is a client of mine. We created a company called DataMoo.

One of the big promises is he helps business owners find ways to increase the value of their companies with their data, but more importantly, he has a series of systems that allow you to get first-party data, intent-based. So if someone is searching for “buy stem cells” in Houston, they can get anyone who’s searching for that data and immediately transfer that person’s contact information, email, even what apps are on their phones, right into the CRM. That means you guys can be doing

real-time search queries and call people who have intent to buy something.

So there's a variety of opportunities we have here. One of them is, Chuck has clients that are going to need outbound dialers. And for you guys, you can cut a deal with Chuck and do intent-based search data and contact information that is scored based upon income, revenue, whatever.

I think there's a massive opportunity here. So you guys chat, talk about opportunities, pick something that is easy to execute on. And guys, this is going to help us do even bigger deals as well.

So I'll let you guys take it from here. Let me know how your first conversation goes. All right. Bye.



Watch this video at: ReferralParty.com/MeetChuck+Howard

Transcript:

Chuck Boyce, meet Howard Getson. I know you guys connected on LinkedIn, but I'm gonna give you another reason to connect.

Howard, if you remember Chuck Boyce, he's in the data business and a whole lot more. We created a new business called DataMoo where he shows businesses how to monetize their data in interesting and unusual ways. He recently took this pitch and closed the \$35-million deal helping law firms, specifically companies and businesses that have huge, huge lawsuits pending and they can identify all the people who are impacted by this and get their direct contact information.

This also means that anyone who has been relying on third-party cookies or Facebook for lead

generation, they can get first-party data, which can include gobs of information. So that means if you wanted to find someone who is searching for, let's say, "invest in hedge fund Dallas," for example, you can get intent-based data in real-time with all the contact information delivered right into your CRM. You can put up ads and start following people around and more. So this is very sophisticated stuff. Chuck has a lot of tools, but also there can be some remarkable ways to take data that he has and visualize it or process it with AI.

So I think a creative conversation between the two of you would be smart. And Howard, it would it be worth learning what Chuck's doing with this law firm because I know your head will start spinning with possibilities and opportunities, and Chuck's in a great position right now where this is a highly profitable opportunity, and there could be some real good ways you can cross-pollinate and work with each other.

So I'll let you guys take it from here. Do let me know how the conversation goes. I'll see you both soon. Bye. Bye.



Watch this video at: ReferralParty.com/MeetSteve+Chuck

Transcript:

Steve Marler. I wanted to re-introduce you to Chuck Boyce. Chuck has a company called DataMoo that we created. He just closed that \$35-million deal with a law firm that they're doing very, very targeted data research, and essentially being able to find people who are affected by a big payout for a lawsuit. But it also means he can do intent-based keyword research.

So anyone who's searching for "full body scan, Houston," "full body scan Dallas," in near real-time can get that data and all the contact information associated with it, and load it into your CRM. It also means you could follow them around with ads.

So imagine being able to grab any kind of keywords that are intent-focused or competitor-focused, it'll grab

all your competitors, anyone who's searching for them, and it could be sent to the call center and they can start smiling and dialing, basically in near real-time. The bottom line is all your keywords and SEO could be turned into an intent-based phone call outreach program and it's very, very affordable. So I wanted to connect to you so you can have that conversation.

The same is true with Regan, for example. He can be doing the exact same thing for stem cells. You know, you can do "stem cells, Park City," "stem cell treatment," or "back pain" or whatever, whatever, whatever.

So step one, pull together a big list of all the keywords you need and want that would be intent-focused. Get them over to Chuck, and you can find out how many of those there are. I've already passed this information along to Andrew and Gil with the call center. And then of course this could get plugged into a Google Ads account which would do a pay-per-click, meaning you don't pay when your ads are showing up. You only pay when someone clicks on an ad. That way anyone who is doing something with intent, you're going to follow them around until the cows come home.

So that's what I got for you. I'll let you guys take it from here and let me know how the conversation goes. Peace.

Networking groups

- EO
- YPO
- Tiger 21
- Genius Network
- Vistage
- Strategic Coach
- Abundance 360

Calendar Apps

- Acuity Scheduling: AcuityScheduling.com
- Calendly: Calendly.com
- Bookafy: Bookafy.com
- OnceHub: OnceHub.com
- Simply Book Me: SimplyBook.Me

BONUS: I did a full interview on my Capability Amplifier podcast with Charles Byrd, walking through the Referral Party process, complete with recordings in real-time. Check it out and download the transcript here: ReferralParty.com/Transcript