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The Book Club Guide

Referral Engine

Teaching Your Business to Market Itself

Thanks again for purchasing *The Referral Engine: Teaching Your Business How To Market Itself*.

This discussion guide is designed to enhance your reading and discussion of the book. It is meant to prompt the application of strategies and techniques covered.

The guide includes key points from each chapter, asks thought provoking questions, and outlines action steps. There is even a spot for notes and ideas that come to you. We hope that they will provide you with new ways of looking at--and talking about—referrals.

It should provide material for discussions as well as individual reflection. Of course, utilization of this discussion guide will be dictated by the goals of your group and available time. Do not feel that each question must be discussed in detail. In fact, the discussion guide was developed with a high-degree of flexibility to allow you or the facilitator to pick and choose the questions and sections most pertinent.

I'd love to know how this book has impacted you specifically personally and professionally. Please let me know about your experiences.

Thanks,

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Ch 1 – The Realities of Referral

Key Questions:

1. Are you actively engaged in building social capital by making referrals to your current customers and clients? If not, why?
2. Do people “buzz” about your business? If not, what steps can you take to create a total experience for your customers and clients?
3. Are you actively engaged in creating a consistent and authentic approach to how you deliver your products and services to your customers?
4. If you do not have a system in place to obtain referrals what pieces are you missing to begin this important business function?

Action Steps:

1. The next time someone asks you for a recommendation for a product or service refer them to a business you have worked with or have heard about from others.
2. Think of an experience you had with a business and determine why it was so outstanding.
3. Write down thoughts on how you deliver a “total experience” to your customers.
4. Determine what has been holding you back from creating a referral system.

Notes, Thoughts and Ideas:

Key Points

1. People make referrals because they need to. We refer as a form of survival and connecting other people.
2. Buzzed about businesses have a good solution draped in a “total experience” that excites, delights or surprises the customer and motivates them to voluntarily talk about their experience
3. As Seth Godin said in a recent interview, “If the marketplace is not talking about you there is a reason. The reason is that you are boring.”
4. Repetition, consistency and authenticity build trust and are the foundational tools of the referral trade.
5. Marketing is a system. However, we cannot all be crammed into the same box as some experts suggest. The ideal referral system can eliminate the need to ever ask for referrals again.
6. The Tragic Referral Reality: You’re not doing anything worth being talked about.

Ch 4 – The Referral System View

Key Questions:

1. Which customers in your existing base make you think, “If only we had 10 more like this?”
2. How can you strip down what you do and create an innovation that anyone can understand, buy, remember and talk about?

Action Steps:

1. Study your existing clients and determine what characteristics they share that either make them ideal or less than ideal.
2. Brainstorm at least 5 potential ideas for a talkable innovation.
3. Create an expectation mindset with your customers.
4. Create a dashboard of key referral indications as a way to set goals and measure the success of your initiatives.

Notes, Thoughts and Ideas:

Key Points

1. Core Talkable
Difference: is the simple, remarkable different that is your chief competitive advantage.
2. Ideal Referral Customer:
until you accept the notion that you must keep your market focus tight, you constrict your organization’s ability to grow.
3. In a fully functioning referral marketing system we move from finding to being found.
4. A fully developed referral system targets two distinct prospect groups.
5. Referral Entry Points:
 - Get an expectation mindset
 - Segment customers from partners
 - Create turn-key tools
 - Plan for logical collection
 - More than one creative entry point
 - Measure and adjust

Ch 5 – Your Authentic Strategy

Key Questions:

1. What perception, perhaps even one word, do you want your customers to have when they think of your business?
2. How can your business be like a “red leaf”?
3. What’s the one way you do business that you can confidently state, “This is how we do it here”?

Action Steps:

1. Create a mash up phrase: “We’re like _____, but with _____.”
2. Create a story for your business, share it and keep it alive.
3. Create a needs discovery process which will become the filter for identifying your ideal customers.
4. Create a method to capture and measure these four goals:
 - a. Lead Generation
 - b. Percent of Leads Converted
 - c. Cost Per Customer Acquisition
 - d. Average dollar transaction per customer

Notes, Thoughts and Ideas:

Key Points

1. Businesses that get talked about are driven by a higher purpose.
2. When you keep hearing “Nobody does that” you are on to something.
3. A widely referred business has differentiated itself by becoming the “red leaf”.
4. Capture and communicate the essence of your differentiation the simplest way possible.
5. Attempting to work with clients who are not ideal is what leads to most of the negative buzz created around a brand.
6. People connect with stories that are personal, telling, truthful and relevant.
7. Little touches are the flourishes that help amplify the company’s message and mission in ways that open doors, excite journalists and cause people to talk.
8. The Secret Sauce: TIHWDIT (This is how we do it here)

Ch 6 – Content as Marketing Driver

Key Questions:

1. What is your primary topic or outline for your “point of view white paper”?
2. How do you plan to gather testimonials from every happy customer?
3. What is your plan for building relationships with key journalists to build awareness for your content?

Action Steps:

1. Sign up at HelpAReporter.com and read the three daily emails and look for stories you can add to as well as clients, prospects, or partners who could be offered as a resource.
2. Visit delicious.com to see what other people are finding and sharing.
3. Take questions you get over and over and turn them into blog posts.

Notes, Thoughts and Ideas:

Key Points

1. In order to generate leads and be found you must put yourself in the path of people who are learning about and shopping in your industry.
2. The best way to make it easy for others to refer your business is to come up with a list of “trigger” phrases that are the exact phrases your prospects utter.
3. Today’s advertiser knows that advertising is less effective at creating sales but very effective for creating awareness.
4. Your advertising’s call to action should be one of permission – permission to teach.
5. If you can prove yourself to be a reliable source of information, you will become a friend to journalists.
6. If you want to learn something, teach it.
7. One of the best way to develop competitive marketing skills is to develop and present a talk of some sort
8. The trick is to find ways to take content you absolutely need to create and find ways to repurpose it.

Ch 7 – Convergence Strategies

Key Questions:

1. If your website is your primary content hub; what spokes will you put in place?
2. How will you merge traditional networking with social networking?
3. What technology, campaigns and personal touches can you employ in your processes to get to Know, Like, Trust and Buy?

Action Steps:

1. Determine and implement items in your dashboard that allows you to monitor what is being said.
2. Determine which social media activities need a routine and devise a plan.
3. Develop a list of staff, strategic partners, and customers you would like to have as blog authors.

Notes, Thoughts and Ideas:

Key Points

1. Having a website is good, but you should consider other online strategies as well.
2. The most easily referred companies are naturally social.
3. Authentic networking is authentic networking no matter the platform.
4. A well-written and well-maintained blog has the ability to deliver the 4 C's.
5. Podcasting uses simple tools to deliver content.
6. Adding audio messages throughout your website can guide your visitor's experience.
7. E-lunches are a new and highly efficient way to meet people.
8. Use tools (free and / or paid) to monitor digital conversations.
9. Set up and employ a systematic approach to social media participation.

Ch 10 – Ready to Receive

Key Questions:

1. How will you position your requests for referral in a manner that offers your referral source the benefit of doing so?
2. What process will you create to ensure that you are making referrals as effectively as you are receiving them?
3. How can you get every employee involved in the acquisition of referrals?

Action Steps:

1. The next time someone approaches you with “My friend said I should contact you” immediately contact the referral source and find out why they did so.
2. If you are not already receiving a flood of referrals determine where your gaps are.
3. Determine what you can do to offer something “special” to the person who was referred to you.
4. Acknowledge those who send referrals, even for ones that do not close and communicate to them throughout the process.

Notes, Thoughts and Ideas:

Key Points

1. When you are talking to an existing client, the benefit of a referral is the opportunity to help that person help a friend or raise their perceived value with a colleague.

Key Points

1. Employing multiple referral programs, focused on different market segments and partners, is the key to building a culture of referral

So, where do you go from here?

There really are a number of ways for you to put the information in this guide to work for you.

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