

## Success Mastermind

### Growing your Business with Referral Partners

#### WHAT IS A REFERRAL PARTNER?

A “referral partner” is someone who is a good fit to refer clients to you.

They’re someone (or a company) that ideally has a sizable number of clients, patients or customers who would make ideal clients *for you*.

I LOVE this strategy because I’ve seen clients of mine end up filling their practice – or getting a steady stream of clients – from 1 or 2 strong referral partners. I’ve also seen clients fill group programs by promoting them through referral partners. (More on that in the “Launching Online Programs” training handout.)

Pretty cool, right?

#### WHO WOULD BE A GOOD REFERRAL PARTNER FOR YOU?

Your first step is to think of people who offer something complimentary to you, but don’t compete with you.

Potential referral partners might be...

- personal trainers
- pilates or yoga studio owners
- chiropractors
- acupuncturists
- therapists
- medical doctors

This is not an exhaustive list, but will get your juices flowing!

While I'm focusing this handout on referral PARTNERS, I also suggest you think about referral SOURCES...

These are people who may not have a steady stream of people to refer to you, but they may know one or more people who could benefit from your services.

These are...

- family
- friends
- acquaintances
- colleagues that you meet in formal networking groups

## HOW TO FIND POTENTIAL REFERRAL PARTNERS

First, I suggest you think about the kinds of people you want to connect with. Now that you have this in your mind, I'm going to ask you to do something a little woo-woo. Stick with me here...

Close your eyes and think about who you want to connect with. Then say to yourself *"I don't know HOW, I just know that it WILL happen."*

Consider that your prayer for what you want – to give more power behind your desires.

Don't worry, we're not going to leave it at that. Of course, I'm going to give you some practical steps to take!

### Who do you know?

It's always easiest to start by connecting with people you already know. Think about practitioners, doctors, and business owners you know. These may be friends, relatives, acquaintances, or places/people you go to as a client/customer or patient.

### Who can the people you know connect you with?

Next, ask around. For example, if you want to connect with personal trainers, ask friends, acquaintances, and co-workers (if you have a "day job") if they know of anyone.

Then ask for an email introduction. You can also post on any Facebook groups or online groups you're a part of. If I'm looking to connect with someone locally, one of the first places I go is the Facebook group for my local mother's club.

## Put networking to work...

A third way to connect with potential referral partners is to network. If you attend networking groups, do so with the goal of meeting the types of people who you identified as potential referral partners.

I also recommend keeping your eyes and ears open when you're engaging in your daily activities. You might meet (or hear of) a personal trainer, integrative medical doctor, or pilates studio when you're at the playground or getting you're a pedicure...

## HOW TO APPROACH POTENTIAL REFERRAL PARTNERS

When looking to connect with potential referral partners, what you DON'T want to do is just drop your business cards off, or dump all your marketing materials off.

I completely understand the desire to quietly drop off materials – with the hopes that the potential referral source will see them, and be excited to connect with you. But this approach almost NEVER works and it's often NOT well-received.

Let's try a more effective approach!

If you're an introvert, like me, you probably feel intimidated by the idea of approaching potential referral partners. If you're picturing yourself cold calling people and this idea has you running for the hills, I feel the same way! I want to put your mind at ease.

Instead of cold calling, there are much easier and more effective ways to connect with potential referral partners.

Whether you're reaching out to someone you already know or someone you've heard about, start by sending a simple email. In the email, share something specific you like/admire about them. Explain that you serve a similar audience and you'd love to discuss how you can support each other.

## Don't be afraid to follow up!

If you don't hear back within a week, follow-up with another email. If you still don't hear back after another week, connect a third time with a phone call and/or an email. This follow-up is KEY. Remember, people are busy and they're likely not getting back to you because they simply have too many emails in their inbox! It is NOT personal and probably has nothing to do with you!

Remember, to make this strategy of connecting with referral partners FUN and work for you, take the focus off the "networking" part and instead approach it with the idea that "I really want to connect with like-minded people whom \*I\* can refer to and hopefully it will be reciprocal."

## HOW TO GET REFERRALS FROM YOUR PARTNERS

We've talked about who might make a good referral partner and how to approach potential referral partners. What about once you have a relationship with a referral partner. What's the best way to GET referrals from them?

**There are 4 critical steps involved in getting referrals, but I often see coaches skipping one or more of these.**

I want you to create connections with partners that lead to you signing on more clients. So I'm going to map out this simple 4-step process.

### Step 1: Focus on building the relationship first

When you're looking for referrals you want to **focus on the other person FIRST and build the relationship.**

The relationship is what will get you the referral – *not just the awareness that your services exist.*

This is a huge missing piece for so many coaches. The point I want to emphasize is that you want give value FIRST before asking for, or expecting, referrals.

So, focus on what's in it for them...Ask yourself the question, "How can I create value for THEM?"

**Focus on how you can help make the referral partner's job EASIER.**

Let's use doctors as an example...

**Most doctors have a list of patients that they see, many of whom need help losing weight and changing their eating habits.** But doctors don't necessarily have the time and in some cases, don't have the training, to speak in detail with their patients about nutrition.

You can connect with local doctors who see the types of patients you'd like to work with. Get to know them and ask them how much they help patients with upgrading their food. Find out if this is something their patients have questions about. And, find out if the doctor recognizes that there's a need for more support for patients in this area.

You could say, "I know you're busy, and you probably don't have time to talk to your patients/clients about nutrition...here's something I have that may help."

This is where your solution would be perfect, to make the doctor's life easier.

Now just a word of caution if you're interested in connecting with doctors.

I think it's really easy for holistic practitioners to act like doctors don't know what they're doing and that "holistic" is the ultimate solution for all doctors. And as true as that might be, this attitude can be very off-putting to medical professionals, especially because they're usually comparing health coach schooling to medical schooling in their own minds.

Obviously, putting people on the defensive isn't going to help you achieve your goals. It's just going to create some weird vibes, and possibly resentment.

This is just something to think about when you're venturing into a doctor's office.

The doctor has had completely different training and educational experience compared to what YOU had. And you should try to respect that.

Bottom line, I think **health coaches can create amazing partnerships with doctors** and I've seen it happen, but you'll want to "prove it" or "earn it" by creating a win/win situation for everyone.

Let's take a look at personal trainers and fitness studios as another example...

In this case, you may meet trainers or fitness studio owners who are great at what they do, but aren't able to fully help their clients get the results they want because they don't teach about food and nutrition.

Their clients likely have a lot of questions about nutrition and this is where you can come in to help the referral partner.

Remember, focus on what's in it for THEM.

## Step 2: Get more referrals by creating raving fans

One of the MOST effective ways to get referrals from your partners is to turn them into a raving fan.

When forming a relationship with a potential referral partner, having THEM or someone in their circle experience working with you can go a LONG way.

Let me give you an example...

Imagine that you met an interior decorator who wanted you to refer people to them. You might think the person was nice and want to help them out, but if you didn't know anything about them or hadn't seen their work, it would be difficult to refer people to them. And even if you did refer someone to them, you wouldn't be able to say more than *"I met an interior decorator recently. You should check her out."*

But what if the interior decorator offered to come to your home and help you with one room of your choosing?

If you LOVED how the decorator helped you transform the room, you'd want to tell everyone about her, wouldn't you?

**I'm not usually a fan of offering your services for free, but it can be a powerful relationship-builder.**

When it comes to offering your services for free as a relationship-building effort, it doesn't have to be the referral partner that samples your services. It certainly can be, but if

they don't have time or don't feel like they need your help it can be someone who works in their office, a significant other, or one of their customers or patients.

You can say... *"I'd love to demonstrate my skills and earn your respect by working with you or someone in your circle gratis and help them achieve some goals. Here's what it would look like..."*

And then you'd explain what it would look like.

It would be WELL worth donating some of your time and effort, if it ended up creating a raving fan, wouldn't it?

When forming a relationship with a potential referral partner, having THEM or someone in their circle experience working with you can go a LONG way.

### Step 3: Create a promotional plan with your referral partners

What about once you have a relationship with a referral partner. What's the best way to GET referrals from them?

You don't simply want to form a relationship and then just hope for the best.

Have a conversation with the referral partner where you discuss how they'd like to share your information. Go into the conversation with ideas in mind of how you'd like them to promote you. Make suggestions and feel out what they're open to.

### Here are some effective promotional strategies...

1. Create a postcard – similar to a business card – that promotes an offer for a free or reduced cost initial consultation. You might call this a "Nutrition Strategy Session" or a "Weight Loss Strategy Session".

You can give those cards to your referral partner so they can personally hand them to people they want to refer. Having them hand the cards to people personally, and having them share a few words about you is much more effective than just leaving a stack of business cards or flyers.

2. Use referral partners to spread the word about group programs that you offer – such as cleanses. In this case, I recommend providing the referral partner with flyers or postcards they can personally hand out – as well as leaving and posting some prominently in their office.

When it comes to asking a referral partner to promote a group program, it's ideal if your referral partner is willing to email their list (if they have one) about your program. Make it easy for your referral partner by providing pre-written copy for the emails. Then they can make any edits they'd like and send it out.

If your referral partner has the space and a large enough client/patient-base, giving a talk at their venue is also an amazingly effective approach.

3. Offer a joint teleseminars or webinar. First, it's a great way to grow your list.

You see, when you promote a webinar to YOUR OWN list, it's a powerful way to build the “know, like, and trust” factor with YOUR audience. It helps them get to know you better and get them interested in what you have to offer.

But...it won't necessarily result in a lot NEW subscribers.

When you team up with someone else to offer a webinar, it's like adding fuel to the fire! You're getting exposure to a whole new audience - you're growing your list -- and, as we've discussed, you're able to build the “know, like, and trust” factor with this new group of people.

When I was a brand new health coach, I did this with a local bootcamp company called “Ultimate Bootcamp.” This was a BIG win for me. I was just getting started, and it was a great way for me to get exposure and grow my list. It was also great for the bootcamp company because they were able to add value to their clients who were looking for good nutritional advice.

In my current business, I've used this strategy twice – once adding over 500 people to my list and the second time adding over 200 people to my list.

Now comes the burning question... “who can YOU partner with?”

I know it can feel a little intimidating to ask someone to host a webinar with you, but initially you're really just reaching out to other business owners and discussing how you can support each other.

As we discussed above, think about the types of people who serve the same audience as you, but don't offer the same EXACT type of services/programs as you. This is where the word "complementary" comes in -- not "competitive," but complementary.

You also want them to have a decent list that they email with some regularity.

With my FIRST joint teleseminar - with Ultimate Bootcamp - it was a local business in MY local area, but they had a list.

You can think of local business AND online businesses.

Who might you be able to reach out to?

This is not an exhaustive list, but some ideas to get your juices flowing are...

- Life coaches
- Relationship coaches
- Parenting coaches
- Business coaches
- Fitness-related companies - and these can be online or brick-and-mortar
- Healthy meal-delivery services
- Juice bars
- Acupuncturists & herbalists
- or Integrative & functional medicine doctors

These can be people you know, or people you've had your eye on from afar.

Don't be shy about reaching out to them with an email. In the email share something specific you like/admire about them. Explain that you serve a similar audience and you'd love to discuss how you can support each other.

Remember, to make any of these strategies of connecting with referral partners work for you, take the focus off the "networking" part and put it on the idea that **"I really want to connect with like-minded people whom \*I\* can refer to and hopefully it will be reciprocal."**

If you can combine these approaches, you're likely to see even better results! This isn't something that happens overnight, but as the relationship grows, you can try out different strategies and see what works the best and what the partner is most open to.

## Step 4: Continue to deepen the relationship

Once you've established a relationship with a partner and they're promoting you in some way, you'll want to deepen the relationship.

When you receive a referral, send a hand written note to the partner with a small gift. (The personal touch goes a long way.)

Follow-up with the partner occasionally to check-in and ask how they are and if there's anything you can do to support them. When appropriate, be sure to share their information with your clients, audience, and inner circle of friends and family.

## PAYING REFERRAL PARTNERS A COMMISSION

In some cases, you'll want to pay your referral partners a referral fee or commission for clients they send your way. You'll decide this on a case-by-case basis. Some referral partner won't ask for or expect a commission. In this case you can simply send them a small gift - as I suggest above.

If you decide to pay your referral partner a commission, you can either track this manually, or you can set-up your referral partners as affiliates and use affiliate tracking technology (which I explain below).

If the referral partner is referring people to you through one-on-one conversations and by handing them your card or postcard, you can simply track those referrals manually. Just be sure to always ask potential clients how they heard about you.

If the referral partner is referring people to you by sending out emails or posting on social media, you'll want to set-up an affiliate program.

## SETTING UP AN AFFILIATE PROGRAM

### What is an affiliate?

An affiliate is a person or company that agrees to promote you, your program, or product in exchange for a commission on each sale. You'll need to use affiliate tracking technology for this. (More information on that in the next section.)

In some cases, you'll want to set-up your referral partners as affiliates. Affiliate partnerships are one of the most powerful ways to boost sales of a program or service.

## How do I setup an affiliate program?

Before you can begin recruiting affiliates and asking them to promote, you'll need to put affiliate tracking program into place. This will allow you to provide your affiliates with unique URLs that they can use to promote so that you can track which sales came from them and how much to pay them in commissions.

There are two systems we recommend for setting up an affiliate system, both of which are shopping cart systems that include affiliate tracking.

### E-junkie

[E-junkie](#) is a good option if you're just starting out because it's a low-cost option (just \$5/month for 10 products) that still provides a lot of functionality for a beginner.

There are some drawbacks to E-junkie:

- 1) E-junkie tracks all purchases from affiliates, but it does not track affiliate clicks. For most people this is not a huge drawback, but it is something to consider.
- 2) E-junkie does not support multi-pay options (2-pay, 3-pay, etc.) If you are offering a higher-priced program and you want your clients to be able to break up their payments, E-junkie is not the right solution for you.

### 1ShoppingCart

[1ShoppingCart](#) (1SC) is a much more robust system, but is also much more expensive (\$119/month) if you are purchasing the package that includes affiliate tracking.

With 1SC you can track clicks from affiliates and setup multi-pay options. You can also setup an unlimited number of products

(Full-disclosure, the links above are affiliate links and I will earn a commission if you click on the link and purchase the service. I only share affiliate links for products or programs that I use and recommend.)

## How do I recruit affiliates?

You want your affiliate program to be a part of your marketing plan. This means starting to reach out to potential affiliates several weeks, and possibly months, before you start promotion.

Brainstorm a list of people you know or admire who have a similar audience but offer something complimentary to you. Referral partners, can be affiliates. Past and current clients also make great affiliates because they are likely connected to your ideal clients and they can speak to the value of your content and programs.

Then, reach out to them on social media (by commenting on their blogs or Facebook posts or re-tweeting their posts) or via email to talk about how you can support each other. Start the email or conversation by discussing how you can promote THEM. Remember, you want to GIVE first.

## How do I get affiliates to promote my programs?

Your affiliates are busy, just like you and me. Make it super easy for affiliates to promote your program. You can make it easy for them by...

- Making all of your communication extremely clear and succinct.
- Providing them with pre-written emails, social media posts, and images they can simply copy and paste.
- Inserting their unique affiliate URL into the pre-written copy you provide.
- Sending them reminders along the way.

## What should I offer as my Commission Rate?

The rate you offer your affiliates will vary depending on the price tag on the program you're selling. You'll want to offer a higher commission percentage for a group program than a private coaching program because private coaching requires significantly more of your time.

When determining the commission, consider what amount will motivate your affiliates to take action. You want them to be motivated to carve out time to send emails and social media posts.

# Marketing for Health Coaches

For group programs, like a cleanse or detox, typical commission rates are 30-50%. Commission for 1:1 coaching would likely be closer to 20%.

When thinking about paying commissions, you may feel that you're losing money. But the thing to remember is that the people who come to you through affiliates never would have known about you otherwise. Think of the revenue you generate from affiliate sales as icing on the cake.

Imagine how adding an affiliate program could boost your sales.