

MRN New Member On-Boarding



MARIN REFERRAL NETWORK
A Professional Community of Marin Entrepreneurs

As of June 2022

Now that you're a new MRN member, you and your mentor will meet up to three times during the first few weeks of your membership to get to know each other and to hone your networking skills.

Developing your Skills with your Mentor

Each new member is assigned a “mentor” from MRN. The purpose is to familiarize the new member with the MRN culture and expectations of membership, as well as to provide assistance and support to help the new member come up to speed as quickly as possible. As a new member, you'll have a seasoned member to whom you can ask questions and get support.

You will meet with your mentor to learn:

Meeting 1:

- How to introduce yourself and your business—perfecting your 30-second introduction
- How to hold effective 1-2-1 meetings

Meeting 2:

- How to make effective referrals to other MRN members
- How to handle referrals given to you by other MRN members

Meeting 3:

- How to get the most out of MRN meetings
- How to prepare for your 10-minute presentation

Meeting 1

Perfecting your 30-second introduction

To craft an effective and engaging 30-second introduction, you will need to

- Identify your specific Ideal Client,
- Their Number One Urgent Problem (in their words),
- The desired Outcome your product/service delivers, &
- Your Irresistible Offer.

You then use this information to craft your 30-second introduction, which has four parts:

- A bold statement or question that piques their interest. For example, “80% of new businesses fail in the first five years!”
- Problem and outcome that you address. “They have no business plan to give them a roadmap for success.”
- Your hot offer. “In a no-cost 30-minute consultation, I help them identify the critical issues they must address for that success.”
- Who you are. “I’m Jane Doe of Your Strategic Success.” This is better placed at the end of your introduction, but could be given first.

You will want to practice your 30-second intro before colleagues and friends who will give you constructive feedback on what they heard and how effective they feel your message is. The more you give it, the better it gets and the less stress you will feel it introducing yourself!

How to hold effective 1-2-1 meetings

Tremendous value results from your getting to know the other MRN members, and this is best done with 1-2-1 meetings outside the regular MRN meetings. The MRN guidelines suggest at least one 1-2-1 meeting each week, but you’ll quickly find you’ll want to try to have more than one each week so that you get to know the other MRN members as quickly as possible. That will enable you to be a more effective referral source for other members. You will also want to have second and third 1-2-1 meetings with most members, as well.

Here are some suggestions of what to cover in one or more 1-2-1s:

- Get to know the person first. Where did they grow up? When did they move to Marin? Where did the move from? What hobbies do they have? Do they have family? Of course, be sensitive to how much someone wants to share about their personal lives—especially when they just met you.
- Get to know their business. Who are their ideal clients? What problems do they solve for their clients? What solutions (products and/or services)? What makes them unique in doing so? How did they get into this business? What is their background that prepared them for this business?
- What help do they need right now? How can you help them the most? Who do you know you can refer to them? Who would be a good referral partner for them? Are you and they good referral partners for each other?

You’ll want to set up your own system to track 1-2-1s, referrals, and closed business from referrals so that weekly reporting is easy and you don’t have to scramble each week.

Develop an attitude of “How can I help you?” The saying, “Givers gain” holds true in MRN, too. When you meet in a 1-2-1, ask “Who do you need to meet?” When you complete a 1-2-1, spend time going through your contacts to determine who might be a good referral for the MRN member with whom you just met.

Meeting 2:

How to make effective referrals to other MRN members

When you craft a referral introduction, you are representing both the person you're referring and the person you're referring to, so you want to present them both in a way that sets positive expectations and interest. You will want to do this in an email if at all possible. Do not use text messages. Do not send just a name and phone number.

An effective referral email will have the following:

- Complete contact information for both parties. Include name, company, email, cell phone at a minimum. You might also want to include both party's website URLs and/or LinkedIn profile URLs.
- For the person you're referring, state what their need is. For example, "Zoe has planning a career change and is seeking help in changing her LinkedIn profile to reflect what she's looking for."
- For the person you're referring to, state what they can do and/or have done for their clients. For example, "Ryan helps his clients find their true underlying purpose and align their desired career with that purpose."
- If you are referring Power Partners (referral partners), you will want to indicate why you feel the two of them will be good referral partners. For example, "You both work with seniors who are making significant changes in their living situation, and I felt the services each of you offer really complement each other very well."

How to handle referrals given to you by other MRN members

When you receive a referral from another MRN member, you should expect to receive the information that you would send if you were giving the referral. You should immediately **reply all** to this email and include the following:

- A thank you to the referring MRN member. For example, "Thank you, Kim, for introducing me to Beverly." Or, "George, thank you for your very gracious introduction to Mark." Feel free to put this in your own style and language.
- A "pleased to meet you virtually" to the referral and express your interest in meeting them in person. For example, "Mark, it's a sincere pleasure to meet you virtually. I've heard much about you from George and look forward to meeting you in person." Again, put this in your own style and language.
- Express that you look forward to meeting them in person if you haven't already done so.
- Suggest that you meet for coffee—or lunch or dinner, if this is appropriate, or tea—and offer some dates and time ranges that you are available over the next two weeks.

Be patient while waiting for a response from the referral. They may be very busy, or traveling, or other reason they're not responding right away. If, after no more than a week, you haven't yet heard back, you could send a follow up email. For example, "Rachel, I just wanted to follow up to make sure you received my prior email. I still have time available over the next two weeks if that would work for you." Again, put this in your own style and language.

Meeting 3:

How to get the most out of MRN meetings

MRN meetings are designed to be very effective, as well as very efficient. To get the most from these meetings, there are several things you can do:

1. Prepare ahead of time for the activity round. Have a written note listing your referrals to other members, your 1-2-1's, and the dollars you've received as a result of referrals from other members (by name).
2. Arrive before the 8:00am starting time.
3. During the meeting, give your full presence.
4. Turn off your cell phone and put it away.
5. No side conversations or walking around during the meeting. Pass the sheet and book back again if necessary.

How to prepare for your 10-minute presentation

Your 10-minute presentation is your opportunity to let your MRN colleagues know more about you and about your business. It's intended to complement your 1-2-1s and to help you build deeper relationships with all of us. Be creative!

When scripting your presentation, consider if your purpose is to educate, motivate, inform, or train. Think about your business as it applies to your Marin Referral Network (MRN) category.

The next(?) part of your 10-Minute Presentation is "The Ask." This is where you actually inform your MRN teammates about the "who, what, where, why and how" of an excellent referral for you.

Outline

- **Introduction:** Include your name, your company name, and your MRN category.
- **Qualifications:** For instance, you could say, "I have 18 years of experience as an insurance agent, five as a health insurance claims representative, and a degree in Insurance from Upper Wabash University."
- **Body:** This is the bulk of your presentation, the body of your presentation contains the information that the audience is expecting, and it must be delivered using an ~~organizational~~ organized structure. After you have identified your main points, you should embellish them with supporting information. For example, add clarity through the use of diagrams, or substantiate the topic with appropriate data.
- **"The Ask":** This is where you actually inform your MRN teammates about the "who, what, where, why and how" of an excellent referral for you.
- **Close:** "I'm Jim Jones of Health Associates—your health insurance specialist—helping my clients, like you, save money and time on health insurance."

Be sure to print out your presentation and rehearse it several times. If you unsure how to use PowerPoint or to share your screen on Zoom, contact:

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