



How to Make AEG Referrals

Referrals are the lifeblood of AEG. The quality of referrals, and how they are given, received and responded to, determines how much value they deliver. Our referrals come from our CEO activities as well as member to member relationships.

Principles

Respect – honor the professionalism and time of members and those to whom referrals are being made by a timely response, clear communication and follow up.

Selflessness – give to get. Those who are looking to refer and give freely, without expecting anything in return, receive more referrals in the long run.

Commitment – referrals are what we do. Always be looking out for referral opportunities. Know the capabilities of each member and work your network to find ways to refer for known needs.

Process

1. Identify Referral and Target

There are two ways to connect people for possible mutual benefit:

- An "introduction" where you sense that two people might benefit from knowing each other. You are not clear of any specific need but think the connection might be mutually beneficial. These are the easy ones and take little effort but should be used carefully.
- A "referral" where one person has told you that they need a service provided by one or more members. These are potentially higher value than an "introduction" and are respectful of everyone's time.
 - a. Look at your member roster and define what a lead needs - ask clarifying questions
 - b. Identify member(s) who might provide needed services
 - c. If unclear whether the member provides the needed services, contact the member to discuss the potential need. It might be that the needed service is poorly defined, or the member is not qualified to deliver.

Although we make best efforts to refer within AEG, if a need can't be referred to an AEG member, it may be useful to make the referral "out of network" to best meet a client or prospect need.

2. Make the referral

There are four reputations at stake when you make a referral. Done right, a great referral brings value now and increases the opportunity for future value through additional work and referrals to other prospects.



Each of the following will commit time and energy to a mutually valuable prospective relationship. If the referral is seen as a waste of time (wrong person, misunderstood need, bad timing), everyone suffers:

- You
- The member you are referring
- The person you are making the referral to
- AEG

Send an email to the lead and referred member, blind copy to referral@entperprisegrowth.org. Ideally, the email should contain a description of the person and/or the organization, even links, and full contact info, as follows (as the saying goes, “make it easy to buy”):

Guy/Margaret and Joe,

The ASBC (<https://www.theasbc.org>) is a local based membership and networking organization of government contractors (municipal, local, state and federal) as well as their contractors. Guy is the Chief Visionary Officer and Margaret is President (co-founders). Since 2004, ASBC has been a force in the contracting world and regularly holds education, networking and community events and services to help B2G activities. It helps these companies grow and strengthen their services.

Payroll Network (<https://www.payrollnetwork.com>) is a local company serving the needs of payroll, benefit, human capital management, managed services and compliance for growing companies. It provides much of the same type of services (education, advice and services) as ASBC and partners with other institutions, brokers and associations to bring those benefits to their members. Payroll Network services are highly integrated and more cost-efficient than trying to manage in-house current and emerging requirements and technologies.

I thought that ASBC members, many of whom may have fragmented systems and levels of compliance, would benefit from exposure to Payroll Network. Here is contact info and I will let you follow up. Please reach out to me if you have trouble making the connection.

Guy Timberlake
Chief Visionary and Co-Founder of ASBC
guy.timberlake@theasbc.org
(410) 381-7378 ext. 703

Joe Young
Executive Vice President of Payroll Network
JYoung@payrollnetwork.com
(301) 219-6897

3. Respond to referral

Your business and the reputation of both the referrer and AEG depend on timely response to a referral. Some members recognize the value of a referral and respond to the referred person within the hour. This is ideal, but all responses should be with 24 hours, even if it is just to set a time to talk. Follow up to confirm connection, then need, then agree to meet.

Report back to AEG (win, lose or defer) to referral@enterprisegrowth.org.