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# Ideas for Successful Introductions

**Some of the top sales minds in insurance give some advice on how to get good introductions that will be meaningful and set up a great opportunity for a sale.**

## Preston Cavignac

- Create a "program" designed to improve retention and create new business.
  - Here is a example;
    - Create three separate lists; Client, Prospect, Center of Influence
    - Organize your lists into sublists by industry.
    - Send a monthly email to each list that is a general topic that will add value to anyone.
    - Send a separate monthly email to the different sublists, delivering industry specific knowledge to develop your brand as an expert.
    - Send a personalized email to each contact within your program at least one a quarter to develop the relationship.

## Michael Bodack

- Producer often make lousy Prospect researchers – find someone else to do it for you.
- Make sure to have way to validate that the people you are finding meet your criteria. Review: LinkedIn, company websites, utilize business intelligence software
- Keep your scope super narrow – ask for only 1-3 introductions to keep it manageable for your Center of Influence.

## Larry Linne

- Focus on the details.
- When talking to the referring person...
    - I have offered to write an introduction email and have been taken up on it numerous times in the past.
    - Tell the Introducer to tell the prospect "Larry promised me he wasn't calling to sell you anything. He said he has wanted to meet you for a while and I wanted to introduce the two of you."
- When talking to the prospect during times like these...
    - Tell the prospect, "I want to assure you this isn't a sales call. I am calling to introduce myself and offer assistance (or give you something... or offer advice... etc)." This will drop the guard a bit.
    - Tell them what you are going to offer them for their time.
    - Promise a short meeting. Suggest it to be a video session (or live if you can). Offer up times or ask for times to meet.
    - Don't sell anything unless you are given permission. If they talk about what you do, then feel free to have that conversation.

## Mike Natalizio

- Now more than ever, leaders are hyper-focused on the "value exchange" received for spending their time with somebody.
- As a consultant/advisor it must be clear that you are authentic and possess the following:
    - Genuine curiosity about the other person.
    - Confidence that you in fact are more than a commodity.
    - Your process is clear and the path to engagement is clear.
    - You will bring value before asking for the business.
- People are naturally attracted to things that are different. Here are a couple of ways to put the magic of differentiation to work for you:
    - Talk about problems, not solutions.
    - Create an experience, not a "discovery". Discovery is for your benefit, while an "experience" is for the client's benefit.
    - Use technology to do the following:
        - less PowerPoint with bullets, more whiteboarding & diagrams.
        - less phone calling, more video conferences.
        - less about you and your services, more about them and what they want.
        - less selling, more workshops providing value to them.