The Give and Gain Meeting

Toolkit

A proven strategy for building loyalty in your customers while bringing you unlimited new sales in return

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I am excited to bring you one of the most powerful sales strategies I have ever used. It is called the Give and Gain Meeting. I have personally used this strategy over the years to build great loyalty in my customer base by bringing unexpected added value to them. One particular customer specifically told me,

“Thank you. I have been in business for over thirty years. Many sales people have asked me for referrals over the years. But you are the very first to ask me how you can refer business to me.”

I got results immediately from the very first time I used the process. Over a very short period of time I was able to attract enough new customers that I earned over $100,000 in commissions – just from this single program. I know how well it works – firsthand.

I devised the Give and Gain Meeting strategy after reading one of the most outstanding books on sales and referrals ever written. That book is called *Endless Referrals* and is written by the bestselling author, Bob Burg. I took Bob’s concept about how he worked in networking groups, and I adapted that process to bring business and value to my customers.
In *Endless Referrals*, Bob makes the following statement:

“All things being equal (or pretty close to equal), people will do business with and refer business to people they know, like and trust.”

I am sure that you have heard that phrase before, and that you accept it for being a foundational principle of sales. If people do not know you, like you, or trust you – they aren’t very likely to do business with you or refer business to you.

Bob’s statement began with, “All things being equal…”

The unfortunate truth is that in sales, all things aren’t equal in many cases. You can’t control certain factors. Your competition may have a lower price than you for a similar product or service. World events may cause delivery issues. Any number of things may happen that will cause things not to be so equal.

Rather than be concerned about things being unequal – I want you to take advantage of it.

My goal with the Give and Gain Meeting process is to take Bob’s quote one step further. I want to teach you to provide so much value to your customer that things are no longer equal. They are heavily weighted in your favor.

Things are weighted in your favor because you are bringing tangible revenue and new customers directly to your customer. Then you are creating even more value by putting a mechanism in place that will continue to grow that value exponentially for both your customer and you.
When you do this, you create such loyalty in your customer that they are extremely willing to help you by referring business to you. They also have no interest in doing business with your competition when they come to call.

The Give and Gain Meeting strategy will make that happen for you. Study it. Internalize it. Then go apply the strategy in your sales model.

There are so many different selling situations in the marketplace that no one idea perfectly fits all circumstances. For that reason, you very well may want to adapt the process to more directly match your business model. When you do, try to keep the integrity of the concept intact. The concept is a unique way to provide value to your customers. By doing so, you increase their loyalty and you increase your referral base.

Remember, knowledge is NOT power. However, the USE of knowledge certainly is.
GOALS OF GIVE AND GAIN MEETING

1. To provide *OUTSTANDING VALUE* to your customers by bringing tangible revenue to their business.
2. To drive immediate new customer sales through introductions from your existing client base.
3. To drive immediate new customer sales through introductions from your prospective client base.
4. To protect your customers from competitive threats.
5. To establish a framework for continuing the process.

What is a Give and Gain Meeting?

In many cases, the sales process tends to be very transactional in nature. You are providing a product or service, and your customer is paying a fair price for that product or service. In transactional sales, the customer’s perception is that you are basically trading for equal value.

The problem with a transactional sales process is that you are viewed by your customer as a commodity. As a commodity, you have no value above and beyond the tangible exchange – and as such, you may lose business to a competitor who may have a similar product at a lower price.
To have a more stable business base, you must raise yourself high above the level of a commodities vendor in the eyes of your customer. You must be seen as a valued and trusted partner in their business.

According to Maslow’s Hierarchy of Needs, your customer is happier with relationships that climb above the level of their basic needs and into the level of their social needs. Relationships that rise to that level are much more rewarding and sustainable.

You can raise your relationship level with your customer to that higher level as you become a trusted and valued partner by providing value that greatly rises above the transactional level of your product or service.

![Maslow's Hierarchy of Needs](image)

Give and Gain Meetings are one of the most outstanding ways to bring that added value and raise your relationship with a customer to the social level.
THREE GREATEST BENEFITS OF GIVE AND GAIN MEETINGS

1. Your customer will laugh at competitors who want to take your business away.
2. Your customer will actively refer new prospective clients to you on a very regular basis.
3. When you follow up with the sustainable and repeatable part of the process, your clients will come to see you as one of the most connected people they know and will actively seek to continue their relationship with you.

Give and Gain Meeting Preparation

Identify 3-5 business owners or companies that you will contact for the meetings. Those contacts may come from existing customers with whom good relationships already exist. However, they may also come from prospects that you want to gain as clients – especially your high value “target” accounts where the prospecting relationship is already established. You will set appointments for 20 minutes with the owners/decision makers in these companies. Owners or high level officers are the best contacts for a Give and Gain meeting because they understand the need for their company to gain new customers. They also tend to have the most at stake – thus they have the most to gain as well.
In preparation for your meeting – if possible, determine what would make a good customer for your client and identify potential business you could refer to them quickly. You probably have a pretty good idea what their ideal customer would be. If you are not sure, you might research their company online for more information.

Don’t reveal those referrals until the proper time in the meeting (don’t show your cards too quickly).

Also, prepare a “Neighbor Network Sheet” with a list of the neighbors of your customer. You will be asking for their assistance in meeting those contacts.

**Give and Gain Meeting Structure**

*Use structured improvisation rather than specific scripts.*

*The following is the outline of what you should do.*

Meeting Discussion Points:

- *Set appointment for 20 minutes with the owner to get their input on something.*
- *At meeting – thank them for being your customer. Tell them that your business is now dependent on their business and you appreciate them very much.*
• You would like to do something that will also help them do more business as well.
• Tell them that you have an ever expanding circle of influence with your clients and your prospective clients – you meet dozens of people each week.
• Ask – “What specifically do I need to be asking the people in my circle of influence so that I can find out if they would be a good business prospect for you and your company?”
• Listen and take notes as they answer.
• If possible – refer business from your circle of influence immediately. Call the referral from your cell phone while still sitting there and let them know to expect the call of your customer.
• Tell your customer that you want to develop a referral network within your circle of influence where everyone is helping the members of the group by doing business with and referring business to each other. Ask if they would like to be a part of that group.
• Pull out your “Neighbor Network Sheet”. Ask your customer of they know the owners of their neighboring businesses. Ask if those owners would recognize their business card. Get a note on the back of their business card saying, “Give _____ 20 minutes. I did.” and have them sign the card.
• Call on the neighbor companies immediately as you leave and schedule appointments. Use your customer’s business card rather than your own.
• Send a thank you note to your customer and keep them apprised of your results.
• Refer a minimum of 2-3 new leads to your customer during the 2 days that follow.

**Build Your Give and Gain Network**

After you have completed your first Give and Gain Meetings, it is now time to build a sustainable network that will continue to provide value for your customers and bring new business to you as well. You will now build your Give and Gain Network.

A Give and Gain Network is a group of business contacts that are committed to doing business with and referring business to each other.

Anyone who is in a business that requires new customers will immediately see the value in both belonging to and helping build a network of this type. When given the opportunity, you will often find that they get quite excited about the process.

You should invite people to join your Give and Gain Network if they fall into any of these three categories:

1. Your personal customers to whom you are committed to refer business.
2. The customers of your Give and Gain contacts – as long as your Give and Gain contacts are committed to refer business to their customers in the same fashion.
3. Any other person who is committed to growing the Give and Gain Network and sees the value in this process.

You should set up some expectations or requirements that need to be met for someone to be a part of your Give and Gain Network. Communicate the immense value that will be gained by becoming a part of the group – and then lay out the responsibilities as well. Use care in how you communicate the group responsibilities. You want to establish the value so that they want to meet the standards. You never want to sound as if you are being bossy 😊

These are a few standards that I would suggest becoming a part of your network culture.

1. Membership should be predicated on being a current client of another member of the group. This is designed for people who want to do business with and refer business to others in the group. If someone is not a current customer of another member of the group, I suggest they become someone’s customer as part of becoming a member.
2. Members should attend monthly lunch and learn (or breakfast and learn) meetings. We will discuss what to do at those meetings a little bit later. I don’t recommend “disavowing” someone that misses a meeting 😃 but you do want to make the meetings valuable – and members should want to attend.
3. Members should give a minimum number of referrals each month to other members of the group. I suggest an average of 1 per week (4 per
meeting cycle). The stories of these referrals should be a topic of
discussion at the next meeting.

4. Members must be committed to doing business with other members of
the group as much as is practical. Realistically, not everyone is a
potential customer for all members of the group. However, it should be
everyone’s goal to support the others in the group as much as is possible.

The practical steps that you should follow to organize and facilitate the
meetings are as follows:

- Start by inviting the first 3-5 Give and Gain contacts with which you began
  the process. Give them the first opportunity to benefit from the value this
  network will provide.
  - Update them on the status of the referrals they gave to you
  - Remind them of the referral network you are building and their desire
    to become a part of the group
  - Invite them to become part of the process by coming to your first
    lunch and learn
  - Ask them to invite one of their customers to come with them
    - Ask them – “Who would be the first person you know that you
      would like to invite to be a part of this network. Who is the
      most important customer for you to provide extra value? Who
      has the potential to help your business the most?”

- Plan your lunch and learn

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Pick a location. May be a restaurant with a meeting room. You may find that a member wants to host the event at their place of business.

Plan on everyone picking up their own checks at the event. I don’t suggest that you host the event and pick up the tab for all members. The exception to separate checks may be if someone is hosting the event at their place of business. They may choose to cater the food.

Have a short agenda. The primary focus should be on members getting to have fellowship with each other while connecting. The agenda does not have to take up the entire time.

Introductions: each meeting should have a period where all members get to introduce themselves and tell the group about the specific value they provide to their customers.

Spotlight: each meeting should also have some spotlight time where specific referral success stories are told to the group. There should also be one member selected each month (more if time allows) who gets a little extra “podium” time to tell about their particular value they provide.

• Duplicate the process
  o Keep repeating the process each month. It may take a couple of times to get the momentum building – but once it begins, your network will grow exponentially and you will be seen as the person who put it all together.
  o Promote the Give and Gain Network meetings via email and notecards.
Teach your clients to duplicate this same process with their clients and promote the same meetings.

Grow the group organically by having customers embrace the philosophy and invite their customers to do the same.

The most important factor in the success of the Give and Gain Network is what you do in your role as the leader. You should set the example by referring as much business to members of the group as you possibly can – even if they are not your customers yet. The whole process is built on a “pay it forward” mentality. When you are seen as the “connector” that makes everything happen, you will find people more than willing to give you introductions and referrals when asked.

As the leader, you should constantly promote the meetings. What gets promoted gets done. The more you keep this concept in front of your contacts – the more successful it will become.

For other valuable resources that will bring you great returns on your time invested, go to:

- www.thesalestourguide.com
- www.jeffcwesl.com
Read what some of the world’s greatest sales leaders are saying about Jeff C. West’s book, The Unexpected Tour Guide.

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“The Unexpected Tour Guide is full of wisdom and insights that will make you a better salesperson and a better person overall in every area of your life.”

~ Brian Tracy, Bestselling Author of Unlimited Sales Success

"Brief, powerful and impactful. The Unexpected Tour Guide combines an entertaining story with some of the best teaching you’ll ever receive on how to become a hugely successful sales professional. If you're in the selling profession, buy this book. If you're a sales manager or leader, buy one for your entire team and watch your sales numbers rise and rise."

~ Bob Burg, Bestselling author of Endless Referrals and Adversaries into Allies

“Your life, your income, the results you’re getting are nothing more than a mirror reflection of what you are putting forth. If you're unsatisfied with your current results, read The Unexpected Tour Guide. It will help you gain a new, improved perspective and find a more fulfilling direction.”

~ Tom Hopkins, Bestselling author of How to Master the Art of Selling and When Buyers Say No (with Ben Katt).

“The Unexpected Tour Guide” may very well be one of those stories you remember for the rest of your life. And if you apply the lessons it contains, it may lead you to one of the best stories yet to be written – yours.”

~ Paul S. Amos, II, President – Aflac

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“The Unexpected Tour Guide; I couldn’t put it down until I finished it. What a great little book. This short read tells a timeless story that will not only be impactful to those in sales or business, but to everyone in every walk of life. Jesus Christ taught through parables for a reason. Jeff West does the same with this gem of a story that will be life changing for all who read it. Thanks Jeff!”

~Michael J. Tomlinson, Aflac, Senior Vice President, Deputy Director of Sales

“Just finished The Unexpected Tour Guide. Thanks in advance from every salesman whose career will be successful because of it! Great story – laughed, cried, remembered.”

~Eric Leger, Vice President – Aflac, Southwest Territory

“I have read many books in my 35+ year sales career and this is one of the best. Jeff has written a book that can change your career but more importantly your life. He shares principles that are timely for the struggling salesperson but also the seasoned professional. Most important he helps us discover why we do what we do.”

~Lynn G. Barnson, State Sales Coordinator, Aflac, Utah

“At around 10:30 I began reading your book… I honestly couldn’t put it down. The funny thing is that I never once considered putting it down and giving in to the temptation to sleep. Your messages are spot on and I truly enjoyed every chapter as the story unfolded. It’s now 1:02 and I just had to send you a note of thanks.”

~Blaze Fremin, State Sales Coordinator – Aflac, Louisiana

"Regardless of how motivated you may be, if you will read Jeff's book and do the exercises, you will become even more motivated and discover areas to develop to take you and your business to a higher level. The Unexpected Tour Guide will become a classic in the field of personal development."

~Mike Butler, State Sales Coordinator – Aflac, North Carolina

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Total Commissions Earned from Give and Gain Process =

Total Sales Made from Give and Gain Process =

How many new accounts have you opened (or set enrollments) from the Give and Gain Process?

How many presentations have you made from the Give and Gain Process?

How many appointments have you booked from the Give and Gain Process?

How many referrals have you GAINED in this process?

How many referrals have you GIVEN in this process?

Give and Gain Meeting Results Tracker

(keep it simple)