Electronic Handshakes

Fast and Comfortable Introductions that Work

INSURANCE WEB X

A SPECIAL REPORT FROM

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The Electronic Handshake!

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Most of my introductions come through an electronic or email handshake – where my referral source introduces me through a short but effective email.

2 Types of Email Introductions

1. **Referral Sources CC's You**

   With this type of email introduction, your referral source will send an email to the prospect, usually say a few things about you, and let the recipient know they cc'd you. If you're lucky, they'll say something like, "I highly recommend you speak with Bill as he's done some great work for us and his system fits your goals for this year."

   While this works, it's not quite as effective as the next type…

2. *The Email Handshake*

   With this type of email introduction, your referral source literally introduces you through email. While this may not seem much different than the method above, we've found it tremendously more effective, because it's more personal. It's clear the referral source wants the connection to be made.

   Laura Smith – *Meet Bill Cates. I don't think there's anyone on the planet who knows as much about the referral process as Bill. He also has a new book coming out soon called "Radical Relevance." I know you were doing some work with your advisors about how they communicate their value proposition.*

We used Bill last month to open our conference with a keynote, followed up with a breakout session; to a standing-room-only crowd.

Bill is a Hall of Fame speaker, delivers great content in a fun and lively manner, and he's one of the easiest to work with experts we've hired in years. He's not one of those primidone types. He works hard to customize his program; and he arrives early and stays afterwards to meet with the attendees. First class all the way?

Bill Cates – *Meet Laura Smith. Laura is the Sr. VP of Marketing at XYZ Financial and is always looking for experts to deliver value for our national and regional conferences.*

Securing the Email Introduction

As you and your referral source are determining the best way for you to be introduced to your prospect, you might suggest that they introduce you with an email. Tell them that you'd like an email handshake. Then explain what that is.

George – I know that Laura would prefer to hear from you before she hears from me. I've found that one of the most comfortable and efficient ways to do this is through an email handshake, where you say, "Laura meet Bill and Bill meet Laura."

I can send an example if you'd like. You can tweak it all you want and send it on to Laura. Just make sure you include me in the Send To line so I can follow up appropriately.

And if you don't mind, can you add what you said about the value I brought to your conference – pretty much what you just said to me?

Your Follow Up to an Email Introduction

There's no need to wait a day to follow up to this introduction. Follow up as quickly as you like. I've had many referral prospects actually thank me for my immediate response.

When you send your initial email to your <u>new</u> prospect, you can either just hit reply or you can create a new subject line that includes the referral source's name at the very beginning. I also don't recommend you include any attachments with this first email. This will help the prospect determine that your email is safe to open.

Subject Line

Laura Smith Asked Me to Contact You

OR

Following up on Laura Smith's introduction

Email Body

George – I see that Laura is saying good things about me. Always nice to see.

I'd like to present myself as a possible resource for you and your company. Can we schedule a five-minute phone call to get the conversation started?

Thank you!
Bill Cates

Notice that I keep my initial email very short. I'm playful in my style, because that's me. Asking for a 5, 10, or 15-minute phone call is usually a very easy "yes" for the new prospect who I've met through the borrowed trust of a person introduction.