

How-To FORM Technique

F

RIENDS/FAMILY

Ask about their friends and family

O

CCUPATION

Ask about what they do for a living

R

ECREATION

Ask what they like to do in their spare time

M

ESSAGE

Share a snippet about your company

ZTO Tip: If you don't use the F.O.R.M. Technique you can miss out. It will help keep you on track and ensure you get the right information about each person. So it is imperative to...

- Maximize your time
- Show proper respect by taking the time to learn about your connections
- Take an interest in and follow up with the introductions/referrals they send
- Follow through and send the referrals they need from your network
- Focus on how you can help them



How-To Find the Right Networking Group for You

Take time to choose the right group. It can make a huge difference in your immediate success.

ZTO Tip: To find the right networking group for you...Review the work you have already done in this Workbook and quickly summarize here by defining your:

- Goals

- Mission

- Personality

- Vision

- Values

- Brand/Business

→ **THEN**...identify a group of people in a setting that meets your needs and fits your principles, values, synergy and benefits your personality.

- Networking Group



How-To Know When to Stay in a Networking Group and When to Go

Answer YES or NO to see if you should STAY or GO in your Networking Group.

NAME OF NETWORKING GROUP			
How To Know When To Stay	YES or NO	YES or NO	YES or NO
Are you getting along with most people and your presence is celebrated?			
Is the group very inclusive?			
Is it a welcoming environment?			
You and many others have received warm introductions			
Is every member's opinion welcome?			
Do you truly feel you are gaining something from the group?			
How To Know When To Go	YES or NO	YES or NO	YES or NO
Do you see cliques within the group?			
Have you witnessed the person running the meeting bashing or belittling other networking groups?			
Have members of the group seem disconnect or not get along?			
Do you find that members are not having meetings and it is more transactional than relational?			
Do you find the number of warm introductions to be low?			
Does the group put more focus on the members than the guests?			



How-To Freeze Your Memberships

Do this...

- Set a tentative date for reinstating your membership, you can hold yourself accountable, and thus take your REAL-ationship to a different level.
- Send the owner of the networking group a personal message and, if you're comfortable, let them know why you're freezing your membership. This provides them insight into how they can provide better value for current and future members.
- Ask the owner how you can contribute to add value to the group.
- Find ways to actively promote the group to others while you're on hiatus to help get guests to attend meetings. This creates more opportunities for members and allows the group to sustain.
- Continue scheduling one-to-ones (Caffeinated Moments) with members of the group to keep building REAL-ationships.



How-To Categorize Your Business Cards/Contacts

There are multiple ways to organize your business cards, but to be most effective with your time and scheduling your meetings over coffee, you need to find an organizational method that works for you.

To effectively schedule meetings:

- Categorize based on location.
- Begin with general location (country/state).
- Then break down by the closest city/town. *Schedule first with the closest city/town.
- Then categorize by industry.
- Then categorize by people's culture *This is to fulfill my connections' cultural wheelhouse (more in Chapter 6).



How-To Categorize Your Phone Contacts & Continue to Add Contacts in the Same Industry

This will help you find people fast and make referrals with light speed!

- Set up your phone with different industry categories
- Then add your contacts under those categories.
- Enter people by how they prefer to be called (shortened versions or nicknames)
- Collect:
 - ★ business cards
 - ★ social media handles
 - ★ phone numbers
 - ★ email addresses
 - ★ and any other pertinent information
- Create a code for where you met each person (eg. B for BNI or CC for the Chamber of Commerce)
- Continue to add contacts in the same industry and keep your list full and edit it as needed



How-To Schedule Stack Days

1. Know who you are meeting with and schedule your meetings so that you can introduce them before one ends and the other begins.
2. Let them know in advance so they are aware of your intentions to introduce and talk about them. Ask them to bring extra business cards or provide their digital business card.
3. If you are meeting virtually, provide them with the same URL link
4. Share tidbits about them so they know who you are connecting them to. Explain why you are connecting them and suggest they schedule a meeting with each other.
5. Wrap up your meeting toward the last 10-15 minutes to begin edifying your next meeting.
6. Take notes (on their business card or Notebook) and (tell them to) build on that information

Example If you have 8 meetings that day, ask your first meeting for seven business cards and distribute them to all your subsequent meetings. All your contacts will get the same amount of introductions that day too which shows your values as a great connector.



How-To Have A Virtual Coffee Shop Experience

For getting the most out of your online communicating

1. A stable internet connection
2. Good lighting.
3. Come to the meeting prepared knowing how to use the video platform including features such as chatbox, screen share, raise hand etc.
4. Check in prior to meeting to make sure that the person you are meeting has the meeting link/info and knows the functions.
5. Test audio and video 5-10 minutes before the call to ensure tech is running smoothly
6. Use headphones in a quiet, private space to optimize sound quality on both ends of the call.
7. Limit visual distractions by using a plain and calm background. Avoid backgrounds that can be distracting.
8. Use screen share to exchange virtual business cards or any contact information of introductions or referrals you intend to share.



How-To Connetiquette Tip Sheet

Be remembered for the way you respected your guest from the very start to the end of your meeting and all the times you connect thereafter.

- Listen, hear, and engage.
- Be interested, not interesting
- Have your business card where it can be seen first before giving it to someone
- Respect people's time — always!
- Praise in public, coach in private.
- Respect everyone at an event or in any networking setting by silencing and putting away your phone and eliminating any distractions around you (especially in a virtual setting).
- Take virtual meetings on a computer rather than a phone to eliminate distracting notifications.
- Respect the speaker by holding off on commentary to those around you until after they've finished speaking.
- Ask for consent before adding people you meet to your email or phone database.
- Ask for consent before adding people on social media or send them a request to like your business page.
- Prioritize the "we" in networking over the "me."
- Respect the professional boundaries of a Caffeinated Moment; do not try to date or flirt with someone during a Caffeinated Moment.
- Always be in a mindset of serving.



How-To Keys To Tour Guide Networking

1. When in a group function, during your Elevator Speech, share your specifications for introductions. Make sure to offer the same opportunity for them to be introduced to your connections.
2. When they answer your questions about who in your city, across the U.S., or even the world that they would like to meet, send or receive email introductions to those people you think fit your connection's ideal referrals.
3. When your connection provides referrals to you, schedule those meetings in your new referral's communities – that's the point, to get out of your area and into theirs.
4. In your Meetings Over Coffee, restate that you're new to the community and looking for introductions there.
5. *Ask if you can expand your connections' industry or cultural wheelhouses by making any introductions or referrals outside of their communities.
6. Schedule to meet every subsequent introduction you receive from that community within that geographical location.

This is an important note. While connecting with people who are different than you and filling out your cultural wheelhouse is important, you should be wary of tokenism. Tokenism is when someone's effort to connect is only a symbolic effort to be inclusive – for the sake of building their cultural wheelhouse and not making a real connection. The goal here is to *not* tokenize. Just like with the industry wheelhouse, the goal is to connect with the human and not reduce them to their identity.

How-To Tips For Being A Good Tour Guide

- Toward the end of a Meeting Over Coffee, ask people who they're looking to meet.
- Ask clarifying questions about the industry, location, personality, or even specific names so you can make the best considerations about the people you know.
- Take Notes – when you write down who they are looking for, you can revisit and think more intently about who you might be able to introduce to one another
- Offer to write a review, ask for a review – reviews add value and credibility to a person or business in turn helps grow the business.



How-To Have A Few Meeting Arrangements & Follow-Up Tips

Make sure you have a follow-up activity planned even before you first reach out or have a meeting.

Initial Meeting > Follow-Up Activity > Record Result > Next Steps

- Schedule a follow-up meeting 30, 60, or 90 days for a second meeting.
- Taking the time to keep records of each attempt keeps you accountable.
- If you need to adjust this process to better fit you, then do so, but ensure you stick to it for everyone so there is no confusion as to what you did with whom.
- The suggested Follow-Up after every Caffeinated Moment:
 - ★ Call and leave a voicemail
 - ★ Send a LinkedIn Message
 - ★ Send a Facebook Message
 - ★ Text Message
 - ★ Send an email
- Keep a list of new referrals for your next meeting and make sure they know you have a list to share – this can inspire a meeting sooner rather than later and keep the connection hot.
- The goal is to make new introductions and/or referrals during the meeting.
- Set the final 10 minutes for REAL-ationship building.
- Meaningful networking is all about quality not quantity.

How-To Network

NETWORKING DO'S

- Be a little early for your event or meeting
- Always give a firm nonverbal greeting, but lead with permission.
- Make sure to have good eye contact the entire time you're speaking to someone.
- Bring a pen, paper, tablet, computer or even a recorder to take notes.
- Say the name of the person four or five times throughout the conversation when you first meet.
- Turn your phone off or put it on vibrate.
- If you have to cancel a meeting try to give as much notice as possible.

NETWORKING DON'TS

- Don't limit doing business with someone just because they're not affiliated with your group.
- Don't share your website in your elevator speech.
- Don't wear your name tag.
- Don't add someone to your email list or newsletter without consent.
- Don't say you are too busy to meet with someone.
- Don't overwhelm a person with a thousand pieces of literature or promotional material once you sit down.
- Don't bring additional people to your meeting unexpectedly.



How-To Warmly Introduce Two Contacts

Subject Line: ABC Meet XYZ, XYZ meet ABC

ABC, XYZ is _____.

(Short Intro: Say something nice about XYZ, share important accolades and achievements, explain how they're doing well and love helping people, plus any other important background information relevant to this introduction. This is essentially a short bio on XYZ and the reason that XYZ will be a good pairing for ABC.)

(Expanded Intro: Include a hobby or sport this person is interested in, a favorite food, preferred genre of books or movies, and if this person is family-oriented, etc.)

XYZ, ABC is _____.

(Repeat the above process.)

ABC, go ahead and start scheduling meetings over coffee with XYZ (and any other individuals listed.)

ABC's Contact Info:

(Name, phone, email and relevant social media links)

XYZ's Contact Info:

(Name, phone, email and relevant social media links)

Sincerely,

Your signature

Tagline

