**Network Engager Framework**

The purpose of the Network Engager is simple — to connect with your warm network, reignite existing relationships, and generate some quick wins.

Your network already knows you, trusts you, and has context on who you are. The key here is to re-engage them intentionally — not just to “check in,” but to add value and open new opportunities.

We’re going to focus on two types of relationships:

1. Referral Partners & COIs (Centers of Influence):  
    These are past or potential referral sources — people who can introduce you to ideal clients.  
    Examples: other brokers, consultants, accountants, real estate agents, or business owners with complementary networks.
2. Potential Direct Clients:  
    These are people already in your network who could become clients themselves — but maybe you haven’t reached out yet because you didn’t have a clear strategy or offer.  
    Now that you’ve got the new BOR strategy and framework in place, it’s time to re-engage with confidence and purpose.

The goal of the Network Engager is to take your existing relationships and convert them into one of two outcomes:

* A warm referral or introduction
* A qualified meeting with someone who could directly benefit from your new strategy

You’re not cold-calling here — you’re activating relationships that already exist.

### **Step 1 | Identify Warm Relationships**

Start by identifying people in your warm network and any relationships you’ve had in the past, current relationships, or people you’ve wanted to approach but haven’t — simply because you didn’t have the confidence or strategy to go after them.

Use the attached spreadsheet to create your list. Include their name and the opportunity (referral partner or potential client). Your goal is to get clarity on who’s already in your circle — and where the opportunities lie.  
Once you’ve built this list, we’ll create your outreach game plan to engage and activate those relationships.

### **Step 2 | Engage**

Now that you’ve identified your warm network, it’s time to engage.

Reach out using whatever communication channel feels most natural for your relationship — text, call, email, or DM. The objective is simple: book a meeting.

You’re not pitching insurance here — you’re opening the door for a conversation built on trust and curiosity.

#### **Two Types of Re-Engagements**

1. Referral Partners / Centers of Influence (COIs)  
    These are people who work with business owners and can connect you with prospects.  
    You’ve got two options here:
   * Casual Setting: Set up a casual networking-style meeting — coffee, lunch, or drinks — just like you would in the past but be clear on your intention and the purpose of the conversation.
   * 30 Minute Meeting: if it feels more natural or professional, invite them to a short, focused conversation.

The difference now is the purpose: you’re showing them the new strategy their clients can use to get the best deal on the market.  
  
 Sample Script: “Hey John, I know it’s been a minute, but I’ve been digging deep into how the insurance game really works.  
 I recently invested in a new strategy that’s helping business owners get the best deal in the market — and it’s something they can use with or without me.  
 Thought it might be useful for your clients.  
 You open to grabbing lunch or coffee this week? I’ll walk you through how it works so you can share it with them. What works best, Wednesday at 12:00 or Thursday at 1:00?”

1. Direct Relationships / Potential Clients These are people already in your circle who could directly benefit from your BOR strategy.  
    You’ve got two options here:
   * Casual Setting: meet them the same way you’d normally hang out — coffee, drinks, dinner — but be clear on your intention and the purpose of the conversation.
   * 15-Minute Call: if it feels more natural or professional, invite them to a short, focused conversation.

Sample Script:  
 “Hey John, I don’t know if you knew this or not, but I’ve been deep in the insurance world for a while — and I just found a new strategy that’s helping people get the best deal on the market. It will completely change how you buy insurance forever, and it’s something you can use with or without me.

You open to a quick 15-minute call (lunch, coffee, etc.) this week so I can walk you through it? What works best, Wednesday at 12:00 or Thursday at 1:00?”

### **Step 3 | Meeting Framework**

You’ve booked the meeting — now it’s time to run it with confidence and purpose. There are two possible outcomes depending on the type of relationship:

1. Referral Partner / COI: Strengthen the relationship and position yourself to get introductions to their clients.
2. Potential Direct Client: Move the relationship into the formal sales process.

Below is how to prepare and run both versions of the meeting.

#### **Referral Partner / COI Meeting**

This meeting is meant to re-establish connection and introduce your new strategy in a professional, valuable way. Below is the framework and strategy you can use for the meeting.

Command  
 You want to make it clear there’s a purpose to the meeting.

Example Command Options:

“Hey, before we dive into catching up, I’ve got something I’d love to share with you — it’ll take about 10 minutes.  
 Then we can hang and catch up after.”  
 or  
 “Hey, I know we’re grabbing lunch, but I definitely have something I want to show you that I think could be a big win for your clients. You good if I dive into that first?”

Meeting Flow

1. Open with Command & Context: Set the tone, take control, and share the purpose.
2. Share the Strategy:  
    “I’ve been studying how the insurance game really works and realized most clients are stuck in a broken process.  
    I’ve invested in a new strategy that helps people get the best deal on the market — and it’s something your clients can use with or without me.”
   * Give them a 5–10 minute overview of the strategy (high level).
   * Position it as a value-add they can bring to their clients.
3. Provide a One-Pager:  
    Leave behind a quick summary of the strategy (you can even offer to co-brand it).  
     
     
    “Feel free to put your branding on it — I want this to make you look good with your clients.”
4. Make the Ask:  
    “If you’ve got any clients who’d want this customized for their business, I’m happy to jump on a quick 15-minute call with them and work out if or how the strategy applies.”

#### **Direct Client Meeting or Call**

If this is someone who could become a direct client, you have two ways to run it, depending on how you set it up:

1. 15-Minute Propsect Interview Call:
   * Treat it like a standard 15-minute interview call.
   * Use the 15-Minute Call Framework from the program.
   * Build rapport naturally (you already have trust), then take command and move into questions.
2. In-Person Meeting (Coffee, Lunch, Drinks):
   * Acknowledge the purpose early.  
      “Hey, I appreciate you meeting up — I’m excited to share this with you. I’ve been testing a new strategy that’s completely changing how clients approach the market.”
   * Then, run either:
     + The 15-Minute Call Framework extended over conversation
     + The One-Call BOR Framework if you feel they’re ready for the full strategy.