

## Operational Overview of Referral System Dev

Here is the operational plan that Chris laid out for operationalizing the referral networks and getting to sales, as described in the meeting:

1. Define Value Proposition and Positioning
  - Chris emphasized the need to move from broad concepts to a succinct, concrete articulation of what they offer, who they serve, and what makes their network valuable. This includes clarifying their unique selling propositions (USPs) and the specific value they can deliver to potential clients or partners.
2. Organize and Structure Contacts
  - Both Chris and Myles need to organize their existing contacts and networks. This involves categorizing, prioritizing, and preparing their lists so they can be reached out to in a targeted, systematic way, rather than relying on ad hoc or memory-based outreach.
3. Engage with Platform/Tool Providers
  - Chris mentioned following up with Dave to get set up with his outreach/referral tool, and to work together on defining the specific outreach strategy, messaging, and operational details. This step is about leveraging technology to make their outreach scalable and effective.
4. Develop Outreach Strategy and Communication Templates
  - They need to work out the specifics of how to approach their networks: what messages to send, who to target, and how to personalize outreach for maximum impact. This includes creating templates and systems for consistent, repeatable communication.
5. Set Aside Dedicated Time for Outreach and Operations
  - Chris suggested that they need to determine how much time they can each dedicate to this effort in the beginning, and to schedule that time for focused work on outreach and follow-up.
6. Schedule Regular Check-ins for Accountability
  - To ensure progress and maintain momentum, Chris proposed weekly or twice-weekly check-ins. These meetings would be used to review progress, address challenges, and keep each other accountable for operational tasks and sales activities.
7. Formalize Agreements and Roles
  - Chris stressed the importance of “papering up” their agreements—defining roles, responsibilities, and contingency plans in writing. This is to prevent misunderstandings and ensure the collaboration is sustainable and professional.
8. Leverage Existing Contracts and Platforms
  - Chris noted that he already has contracts with some members of the Folk network and access to a platform for identifying skills and needs within the network. This infrastructure can be used to match opportunities and manage referrals more efficiently.

9. Develop a System for Managing Introductions and Closing Sales
  - The plan includes not just making introductions, but also supporting those introductions through to closed business, tracking outcomes, and ensuring referral fees or commissions are properly managed and received.
10. Iterate and Refine the System
  - Chris acknowledged that the plan would need to be refined over time, based on feedback and results, and that they should be open to adding new operational elements as needed.

This operational plan is designed to move from high-level ideas to a structured, repeatable system for leveraging their networks, conducting outreach, and generating sales through referrals. It addresses both the strategic and tactical aspects needed to make the collaboration successful and sustainable.

## CHRIS TO DO

Here is a more detailed and context-rich outline of each action item Chris Heuer took on, with an explanation of the broader issues and intentions behind them:

1. Discuss how to mine their networks together and do something collaborative
  - Context & Broader Issue: Both Chris and Myles recognize the untapped value in their professional networks, especially as traditional public engagement wanes and personal connections become more important. The action is not just about making introductions, but about systematically leveraging their combined relationships to create new opportunities, mutual support, and potentially revenue-generating collaborations. This addresses the challenge of moving from isolated efforts to a more intentional, structured approach to network mining, and overcoming the inertia and emotional barriers that come with reaching out after periods of disconnection.
2. Explore integrating with Myles' "Startup Live" project
  - Context & Broader Issue: Myles is developing "Startup Live," a platform for delivering curated, actionable news and insights to startup founders and, eventually, other niche markets. Chris's action is to consider how his skills, network, and strategic thinking could plug into this project, potentially helping with business development, content, or operational strategy. This addresses the broader issue of finding synergistic projects where both can contribute and benefit, and where Chris can apply his "startup magic" to help bring a promising idea to market.

3. Get an introduction for Myles to “Next Play”
  - Context & Broader Issue: “Next Play” is mentioned as a valuable networking and job-hunting resource. Chris offers to connect Myles, recognizing the importance of expanding Myles’ access to new opportunities and communities. This action reflects the broader theme of mutual aid and amplification—actively helping each other (and their networks) find new pathways, rather than passively waiting for opportunities.
4. Send the Otter link of this meeting to Myles
  - Context & Broader Issue: Chris commits to sharing the meeting recording, ensuring that both have a record of their ideas, plans, and commitments. This supports transparency, accountability, and the ability to revisit and refine their strategies. It also models the use of tools (like Otter) to operationalize and document their collaborative process.
5. Follow up with Dave to get set up and figure out the specific outreach strategy and communications
  - Context & Broader Issue: Dave is developing a tool/platform for network outreach and referral monetization. Chris’s follow-up involves not just getting access, but working with Dave to define the operational details—how to structure outreach, what messages to use, and how to make the process scalable and effective. This addresses the need to move from high-level ideas to concrete, actionable systems, and to leverage technology to make their efforts more efficient and impactful.
6. Organize contacts and networks for more effective outreach and collaboration
  - Context & Broader Issue: Both Chris and Myles acknowledge that their networks are currently unstructured and underutilized. Chris’s action is to begin the process of organizing contacts—categorizing, prioritizing, and preparing them for targeted outreach. This is foundational for any systematic network mining or collaborative business development, and addresses the challenge of turning “potential” into “actionable opportunity.”
7. Schedule regular check-ins (weekly or twice a week) for accountability and operational progress
  - Context & Broader Issue: Recognizing the risk of ideas stalling without follow-through, Chris proposes regular check-ins to maintain momentum, provide mutual support, and ensure that operational tasks are being completed. This addresses the broader issue of accountability, which is especially important when both are juggling multiple projects and dealing with the emotional ups and downs of entrepreneurship and job searching.
8. Formalize agreements and operational details for the collaboration
  - Context & Broader Issue: Chris notes the importance of “papering up” their agreements—defining roles, responsibilities, and contingency plans in writing.

This is to prevent misunderstandings, protect the relationship, and ensure that the collaboration can survive challenges or disagreements. It reflects a mature, professional approach to partnership, addressing the broader issue of sustainability and risk management in collaborative ventures.

## Myles Requests

During the meeting, Myles asked for the following:

1. **Structure and Operational Clarity:** Myles requested that if he and Chris are to collaborate on network mining or any new venture, he needs clear structure, concrete steps, and operational guidance. He emphasized that his mind is on many projects and he needs Chris to help "reel him in" and tell him specifically what to do, rather than just discussing broad concepts.
2. **Partnership and Collaboration:** Myles expressed his willingness and desire to partner with Chris, but reiterated the need for actionable plans and outcomes to make the collaboration effective.
3. **Help with "Startup Live":** Myles invited Chris to discuss how he could plug into the "Startup Live" project once it is technically ready, indicating he would value Chris's involvement and expertise in business development or strategy.
4. **Introductions and Networking Support:** Myles was open to introductions to valuable resources, such as "Next Play," to help with his own job search and professional growth.
5. **Accountability and Regular Check-ins:** Implicitly, by agreeing to regular check-ins and expressing the need for operational discipline, Myles asked for a system of accountability to help ensure progress and follow-through.

In summary, Myles asked for partnership, structure, actionable guidance, support with his project, networking introductions, and accountability mechanisms.