

Invitation to Business Owner Lunch Dialogue

Now that you know who you want to invite, here is an example of what to say when you call:

What we have in common:

“As business owners, one thing we have in common is the need to continually generate leads.”

The best type of client:

“In my experience, the best type of client to work with is a referral because they come with a level of trust in me and knowledge of the kind of service I’ll provide.”

My goal:

“My goal is to seek out like-minded business owners who are committed to delivering excellent service, who I can refer my clients to, and create win-win relationships with—where we both benefit from referred business.”

Do you want to get together?:

“Do you want to get together and see how we can help each other? I thought maybe we could meet for lunch. How does that sound?”



It's Just Lunch Dialogues

Dialogue for a “business bite” with an other business owner.

Agent “As business owners, one thing we have in common is the need to continually generate leads.”

Business owner “That’s true...”

Agent “While advertising and direct mail have brought me some leads, they’re pretty expensive, and creating ad pieces can be time-consuming. Online leads haven’t really worked out well either.”

Business owner “I spent a lot on advertising last year...”

Agent “In my experience, the best type of client to work with is a referral because they come with a level of trust and knowledge of the kind of service I’ll provide.”

Business owner “Hmm....”

Agent “As part of the way I plan on doing business from here forward, I’ll be sending out mailings every month to people like you. Here’s an example.”

[Show one of your mailings from the Blitz]

“My goal is to seek out like-minded business owners who are committed to delivering excellent service that I can refer my clients to. I also want to create win-win relationships where we both benefit from referred business.”

“The benefits to you are increased referrals for your business and a core group of business people you can rely on to refer you to others.”

Business owner “That would be great, especially right now in this economy.”

Agent “Well, I’m glad you agree.”



If this is a Business owner you know you can put your name to [optional]:

Agent [Introduce your Business Directory.]

“I also have an opportunity you may want to take advantage of...”

“Because of the nature of my business and the depth of the relationships I have with my clients, I refer people to businesses like yours on a regular basis. In order to make this hassle-free for my clients, I’m putting together an easily accessible online Business Directory of select local businesses I trust.”

“My Business Directory will include attorneys, financial planners, loan officers, hair salons, pizza parlors, painters, roofers and veterinarians, just to name a few.”

“There is NO COST for you to have this type of exposure to my clients. My only request is that you do an excellent job for them, like you always do.”

“Would you like to be included in my Business Directory?”

Business owner “Sure. It sounds like a great opportunity to get more business in a way that doesn’t take extra time or effort on my part.”

— When it comes to referrals, make sure you give first. Listen for opportunities to refer your clients to this business owner. If you send personalized mailings as part of your Membership, why not feature their business on your next mailing?

