

30X REFERRAL EVENTS



Kitces Marketing Summit

Hi, I'm Libby...

I used to get REALLY frustrated when my corporate office would bring in another HYPE GUY or HYPE GAL. You know the kind... the ones that get you super jacked up to go achieve world domination and give you amazing ideas.... and then you'd get back to your office and you'd be like...

“OKAY I LOVE THAT IDEA.... BUT LIKE... HOW?”

I've always been one that's like "show me exactly what you did." I don't have the time or the desire to create something from scratch.

“C'MON... IF YOU DID THIS AND IT WORKED CAN'T YOU JUST GIVE US THE TEMPLATE?”

And that's where The Efficient Advisor was born.

I 100% made that word up

I had advisors from all over the country wanting to know how I scaled to a 7-figure single-advisor practice while only working 3 days a week. I quickly realized that it was by creating **SIMPLE, REPEATABLE, & DELIGATABLE** processes. And, those would be really easy to share with other advisors. They could adapt these systems to work for their niche, their team structure, and their goals.

My promise to you is that every episode of my podcast, every training video in my free library, and everything else we create is going to give you something you can **IMPLEMENT IMMEDIATELY**.

The HOW to back up the WHY.

I'd love for you to join me in **The Efficient Advisor Community** on Facebook (or Meta... or whatever they call it now). It's a free private group where Advisors from all over the world, with different business structures and serving different niches can bounce ideas off each other, ask what's working for others, and just flat out learn how to grow their businesses without all the overwhelm.



THE WHITE GLOVE REFERRAL EVENT BLUEPRINT©



The White Glove Referral Event Blueprint©

1) Unique Experiences: What ideas come to mind? Check out Libby's list of events!

2) Client Host: Who is your ideal client? Who do you have fun with? What clients run in social circles that have your ideal client? Who do you just love working with that brings you joy?

1) _____	5) _____
2) _____	6) _____
3) _____	7) _____
4) _____	8) _____

3) Invite Your Client Host: Make the invite about THEM, but be clear about what you're trying to do and who you're trying to do it with (in a non-salesy way, of course!) Check out Libby's example script.

4) Craft a talk that has a hook! And, has a laser-focused message to the ideal client avatar that's been invited:

Two Different Methods:

Short Format: 15-min talk at the beginning with stories, targeted language, and a reason to talk to you

This, then That: Intermixing event and tips/points (i.e. taste a wine, then give a tax strategy, and repeat)

5) Follow Up Process: The fruit is in the follow up!

Libby's Suggested Formula:

- 1) Send photos from the event along with educational pieces to any specific questions they asked at the event - 3 days after the event
- 2) Follow up to invite them to a discovery call/coffee/etc with you to follow up on your talk and answer any questions they may have - 10 Days After the event
- 3) Follow up again - 1 month after the event
- 4) Send a "Lost Cause" letter at 6 months after the event (you can learn more about my Lost Cause Letter in Episode #94 of The Efficient Advisor Podcast)

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Sample Invite Script for Your Client Host:

Objective to keep in mind while inviting: You want them to understand: 1. What you are trying to do (appreciate them!) 2. Give them examples of unique experiences that you think they would enjoy based on what you know about them 3. Tell them you want to do it when it's good for them (give date options), with the people they enjoy, doing an activity based on their interests! 4. Slip in who you might want them to invite

Example script: “Andrea, I have absolutely loved working with you and Rick over the last several years... Your situation is the one that I feel like I was built for. I love working with high-income-earning women who are just crushing it in their careers and are also moms, and I have found that I really specifically like working with pharmaceutical sales reps like you. As you know, you've got a crazy benefits package that's based off of a tiny salary, where most of your compensation comes from this wacky bonus that you get, and I just think it's so much fun and there's so much work to do. So here is what I'm thinking...

I used to do these big client appreciation events where I picked the time, the day, the restaurant, the menu, the people you sat with, and the agenda. And while they were super fun, I didn't feel like I was really showing appreciation to my clients in the way that I really wanted to. So instead, I've got this idea, and I was hoping you might help me with it. I would love to host an event for you and some of your girlfriends/work friends. We could do a wine tasting, a mani-pedi night, or a flower-arranging class—just something that would be enjoyable and relaxing for you and your girlfriends/work friends.

I'd love to host one of these for you, have you pick a date and time that works for you, and invite the people you want to spend time with. And you know me—I'm not very salesy, and I'm not going to make it weird. I'll talk for like 10 or 15 minutes just about the planning I do for pharmaceutical sales reps and some tips and tricks for people who have these wacky benefits packages. I really want to bring awareness to some of the gaps and issues that these ladies might not even know exist, and I'll talk a little shop so I can deduct the event! Otherwise, we'll just hang out, get our nails painted, have some great wine, and I'll have it catered. Does that sound like fun to you? Would you enjoy that more than sitting in a big ballroom with a bunch of other people?”

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The White Glove Referral Event Idea List:

Objective to keep in mind while planning: Create an experience that is centered around the clients' interest and makes them feel appreciated. Should be interesting and unique enough they will want to invite their friends and would talk about it at the office on Monday.

Personal Stylist Party (dressing for your body type)
Flower Arranging Class
Cake/Cupcake Decorating
Wine Tasting/Winery Tour
Murder mystery dinner
BeerTasting/Happy Hour (Martinis & Money) (Brews & News)
Mani/Pedi Event (We called our Tips & Toes)
Quilt Shop Hop (Bus tour to different shops)
Cooking Class
Golf Pro Tips/Top Golf
Sporting Events
Candy Shop Takeover (make fudge, waffle cones)
Sushi making
Tennis pro clinic
Beer brewing Basics
Regional Wine Tasting
Cheese making
Ethnic event–education on culture/food/etc
Art exhibit (private tour guide)
Intro to Pickleball
Pottery painting
Wine and painting event
Pedal CabWreath Making (holiday time)
Candle making
Escape room
Gardening expert (tour a garden, learn about pollinators/planting styles)
Behind-the-scenes at the zoo (feed the animals)
Penguin experience at the aquarium
Progressive dinner bus tour

You get the picture!