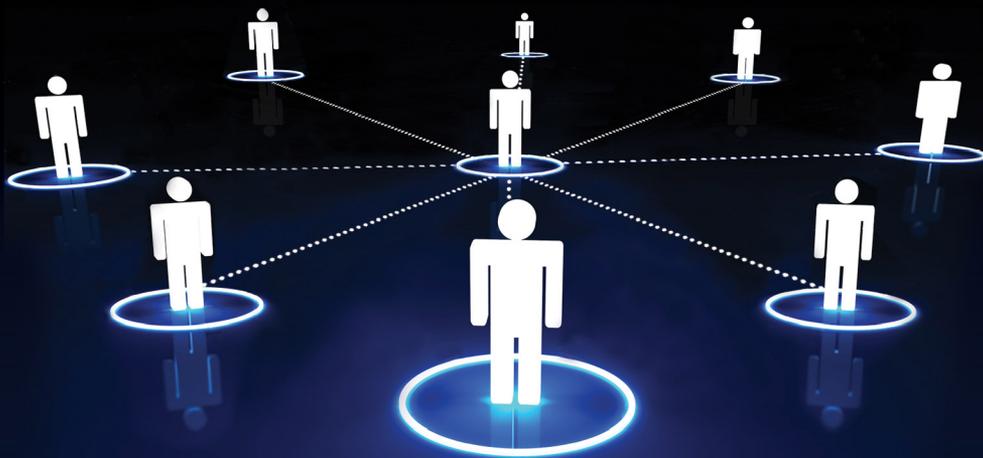


# THE BLUE CIRCLES

*Turning Relationships  
into Referrals*

.....  
Make More Money • Have More Fun • Build Deeper  
Relationships • Use a Proven and Effective System



Laura A Bruno

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 SBL Publishing

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# CHAPTER 1

## Referrals by Design...Not by Chance

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*“You can design and create and build the most wonderful place in the world.  
But it takes people to make the dream a reality.”*

**WALT DISNEY, FOUNDER OF DISNEYLAND**

“People do business with people they know, like, and trust” is a familiar adage.

When you build meaningful relationships and offer a quality service or product, then people just might buy from you, help you, or refer you. While there are no guarantees, my more than ten years of experience in coaching entrepreneurs, trusted advisors, and sales professionals has helped me master a methodology that can dramatically increase your likelihood of referral success.

This book is about receiving high-quality referrals and significantly increasing your closing ratios. The good news is this methodology is more effective than traditional network-

ing, is more rewarding, and is even easier. Many people who have adopted the methodology have doubled and tripled their revenue in just one year.

My intent is to help the people frustrated with a lack of results from their networking efforts and who wish to find a way to get a better ROI on their time and money. This is not a guide for beginners, although they can benefit greatly from the tools and techniques about building strategic relationships. The advice in this book is for business people who are good at what they do and are already investing time and money in networking. What they really want is to find ways to maximize the results.

Does that describe you? Perhaps you are already making many networking connections. But here are the key questions: Are you making meaningful connections? Are you getting referrals by chance or by design? Are you building solid strategic relationships?

Fortunately, the code has already been cracked on how to do this. Read on for the advanced take on how to get more people to know, like, and trust you. And more importantly, on how to get more people to gladly refer you to the ideal prospects whom you want to meet.

Another favorite adage is, "Success is a journey." Let's get started on your journey to creating meaningful connections.

## Referrals by Design . . . Not by Chance

Let us begin with some definitions. Before you can make a sale you need a sales lead, which is the identification data of a person or entity that has the interest, authority and budget to purchase a product or service. Entrepreneurs, trusted advisors and sales professionals usually gain access to sales leads through advertising, trade shows, direct mailings and referrals. Referrals come in two flavors: referrals by chance and referrals by design.

Most referrals are what I call “referrals by chance.” When people want a recommendation on who is a good person to help supply them with a service or product, they ask around. Do you know a good insurance agent? Do you know a good financial planner? Do you know a good attorney?

Maybe we have someone we know, like, and trust who would be a good fit. Maybe we have a business card from someone we just met at a networking event. This chance request might lead to a chance referral.

Ah, but a referral by *design* is another matter. Are you familiar with the candy Reese’s Pieces? They are the perfect blend of chocolate and peanut butter. Some referrals by design are exactly like that.

I met Steve at a Chamber of Commerce networking event years ago, and he became a client. Steve owns a paper shredding company. Because my desire was to help my cli-

ents make strategic partnerships, I knew a good source of referrals for him would be Ann, who owned a company that takes paper documents and puts them on a CD to create a paperless environment. I took the time to talk to each of them about the other, and made the introduction.

When I met Steve, I knew he and Ann should meet and get to know each other. They were both knowledgeable in their industry, outgoing, friendly and great networkers. They had the opportunity to form a strategic relationship, educate each other about their ideal client prospect and then send each other referrals by design.

Steve and Ann are still referring each other back and forth, and both have dramatically grown their businesses as a result. Each is a member of the other's Blue Circle of relationships. It works a lot like chocolate and peanut butter.

Another example is Larry, a business consultant and client, who has a very narrow niche of clientele he wants to attract. His clients generate between \$50 million and \$500 million in annual revenue, are located in the western United States and want to streamline their internal operations and grow their businesses. Larry has been networking for years without many referrals, hoping to get referrals by chance.

We defined his criteria and paid for a list of 195 businesses. Larry went to work on researching which companies would be great targets for him to pursue as clients, successfully

narrowing the list to twenty-six firms. He then identified the strongest relationships he had within that group and “got his ask in gear.” With that little bit of extra work, he pursued receiving Referrals by Design...Not by Chance. And he did, indeed, begin to receive referrals.

Referrals by Design...Not by Chance is a proactive, on-going marketing campaign you create that is designed to get people with whom you have a strong relationship to actively refer business to you, by introductions to strategic partners or potential clients.

The referral by design approach will change the way you grow your business.

This approach has two components. In the first, you are creating your own circles of relationships. I call these Blue Circles. In the second step you create marketing strategies and tactics to enlist help from your Blue Circles to get more qualified prospects into your referral pipeline.

With a referral by design, both parties—say, Steve and Ann in the example above—go out of their way to help and promote each other. They invest time and get to know each other well on a professional and personal basis. As a business relationship, Blue Circles also are commonly referred to as spheres of influence or circles of influence, strategic alliances, referral sources and referral partners.

Here is another example: I have a couple of strategic Blue Circle relationships who send out newsletters once a month. Because I know, like, and trust them, I will post their newsletters on my social media, LinkedIn and Twitter, to increase their exposure online and among my Blue Circle partners. That example is just one easy way to utilize a referral by design approach. I will identify and discuss other strategies and tactics in depth later in the book.

But what really makes it work—the secret sauce—is working with an amazing system called DISC to understand behavioral styles. And then putting that knowledge to use in converting relationships, landing clients and growing business. It's all part of the journey.

## **Meet Your Tour Guide**

Before we begin this guided tour of how to build strategic relationships that result in referrals by design, please allow me to introduce myself.

My name is Laura A Bruno (that's right, just A, no period). As a professional trainer, speaker and consultant I regularly lead workshops in Southern California on building strategic relationships. On a personal note, some of my passions are playing golf, watching NFL football, spending time with my family, and visiting one of the most wonderful places in the world, Disneyland (I am an annual passholder). Prior to venturing out on my own, I spent twenty-one years in sales, marketing and HR for Pacific Bell, which is now AT&T again.

But my labor of love since 2004 has been helping business people from all walks of life, such as lawyers, bankers, accountants, business brokers, financial advisors, insurance agents, consultants, real estate and sales people, give and receive referrals that have transformed their businesses and made them hundreds of thousands of dollars in new business. Using my unique philosophy, techniques and tools, these successful business people have created a pipeline of steady referrals that have helped them grow their businesses and personal wealth so they have the time to do the things that really matter to them.

And you can do it, too, with the right path and plan.

Since 2004 I've coached successful business people on sharpening their relationships and growing their revenues. I've developed strategies, tactics and worksheets that help people turn into referral magnets. These people attract a circle of partners, called Blue Circle relationships, that actively look for referrals for each other and who work diligently to grow their businesses.

## **The Right Way to Think About Referrals**

Referrals are the life force of a business. But many business people who are very good at what they do underperform when it comes to receiving enough quality referrals to help their businesses grow. However, with some guidance, these people can figure out how to create a steady stream of referrals.

So what's the difference between referral-rich businesses and ones that are referral underperformers? In one word: relationships.

You may have heard that the secret to building relationships is to follow the Golden Rule: Treat others the way you want to be treated.

In my experience, however, the most successful referral generators instead follow the “Platinum Rule”—treat others the way *they* want to be treated.

It was created by legendary business author and speaker Dr. Tony Alessandra, and here is why he argues that the better alternative to the Golden Rule is the Platinum Rule:

*The Platinum Rule accommodates the feelings of others. The focus of relationships shifts from “this is what I want, so I’ll give everyone the same thing” to “let me first understand what they want and then I’ll give it to them.”...You do not have to change your personality. You simply have to understand what drives people and recognize your options for dealing with them.*

But how, you might ask, do you know how others want to be treated? By understanding their behavioral preferences, which fall into four basic styles. When you treat people according to their behavioral style, you are practicing the

Platinum Rule. A key to understanding the four styles is an understanding of a globally used and trademarked process called DISC. Here is a quick overview.

Each of the letters in “DISC” represents a behavioral style of the people you meet and deal with every day.

**D stands for Dominance.** The key behavioral traits of “High-D” people are:

- Direct
- Daring
- Decisive

**I stands for Influence.** The key behavioral traits of “High-I” people are:

- Inspiring
- Influence
- Interaction

**S stands for Steady.** The key behavioral traits of “High-S” people are:

- Stable
- Sincere
- Sensitive

**C stands for Compliance.** The key behavioral traits of “High-C” people are:

- Cautious
- Conventional
- Composure

A further discussion of DISC and how to quickly identify a person's behavior type and respond accordingly will be spelled out in detail in Chapter 3.

## **Applying the Methodology of Turning Relationships into Referrals**

There is a force in the universe that has been called the Law of Reciprocity. The concept is simple: What goes around comes around. Call it karma, call it kismet, call it what you will. The more you give, the more you shall receive. Nothing you do goes unnoticed.

Turning relationships into referrals is a step-by-step process and a collection of principles based on reciprocity. The overlay is understanding DISC and applying the Platinum Rule. For those who prefer process and results (high-Ds and high-Cs, I'm talking to you, and you'll soon know what I mean), here are key elements to my philosophy about turning strategic relationships into referrals:

1. Learn the four DISC behavioral styles and know your own behavioral style.
2. Determine your entrée product or service offering.
3. Commit to paper the ten-characteristic profile of your ideal client and share it.
4. Build a circle of referral partners called Blue Circle relationships.

5. Evaluate your relationships with each of your Blue Circle partners.
6. Create an action plan for deepening your Blue Circle relationships.
7. Move relationships from likeable to credible to referable.
8. Develop and implement your action plan.
9. Create a PowerPoint training presentation and share it with the people in your Blue Circles.
10. Create your own Blue Circle mastermind group for referrals and accountability.

Building a strong referral circle of relationships is well within your grasp if you follow the Platinum Rule that says, “Treat others the way they want to be treated.” When you use DISC to uncover your behavioral style—and those of others—you will be well on your way to creating the foundation of strong relationships based on knowing, liking, and trusting. A first step on the path is building positive credibility, which is the subject of the following chapter.