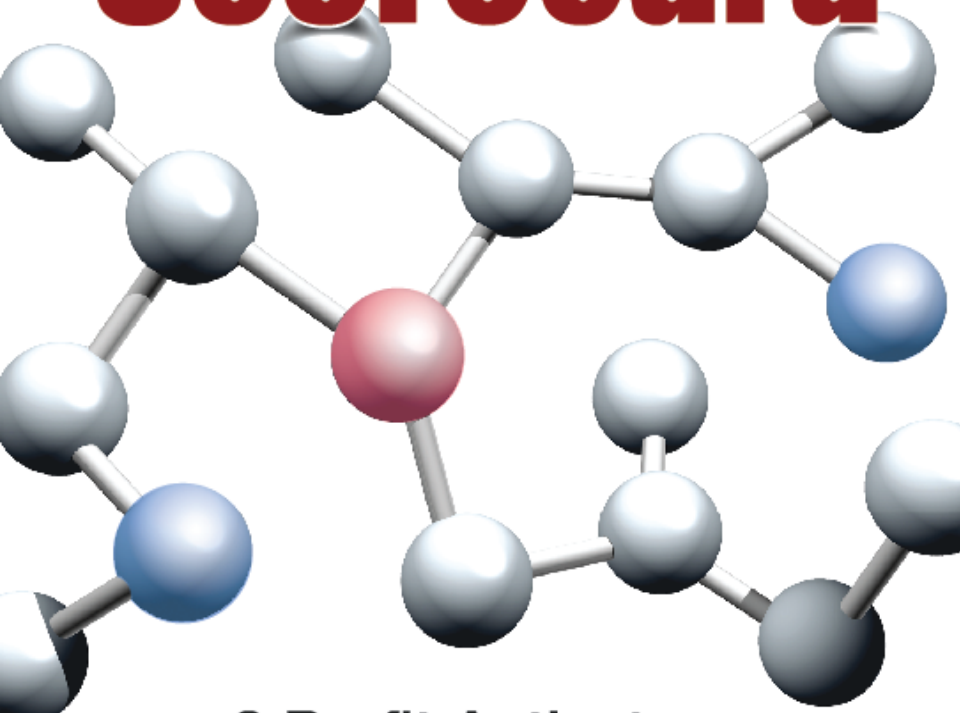


Your Profit Activator Scorecard



**8 Profit Activators
Growing or Slowing Your
Business Right Now**

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Your Profit Activator Scorecard

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AudioBook download at
BreakthroughDNA.com/scorecard

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The Profit Activator Scorecard

The Profit Activator Scorecard gives you the opportunity to review your business and look for breakthroughs by measuring the 8 Profit Activators discussed in the companion book *Breakthrough DNA*.

These 8 Profit Activators can be triggered in your business right now. Each is one mindset measured in this scorecard to show you the opportunity that already exists in your business, and identify the areas that holds room for improvement. Everyone will find themselves somewhere on this scorecard.

The Breakthrough DNA process is universally applicable because it is always present. I named the process “Breakthrough DNA” because I view each of these Profit Activators as a little DNA cell that manifests differently in every type of business, but is universally present.

As you read, keep in mind that each of these Profit Activators are present in your business. The examples describe a variety of situations and progressions related to each one of those Profit Activators, but how do they relate to you?

I’m excited to hear about your breakthroughs.

Dean

Mindset Number One: Select a Single Target Market

The most difficult thing for people to do is to select a single target market *at a time*, to narrow their focus to a single target market despite the fear of missing out on something. To review the way that might manifest itself in your business, we can start by looking at column one of the single target market mindset, **you target everyone and anyone, taking what you can get and casting the widest possible net.**

Many owners might recognize themselves in that area, especially early on in a business; since the owner is not sure where the traction will be or where to narrow their focus, they try to leave their options open by saying, "We can help anybody with anything." That can show up geographically in a business that is delivered locally. Owners want to expand, and they think that a bigger territory will get them more business. It seems counter-intuitive to become limited to a single target market, intentionally trying to get a smaller piece of the bigger pie.

Sometimes in the second column, people take their cue by current conditions in the market. In column two, **you focus your marketing efforts on the hot or trending market right now.** On the surface, that seems like the thing to do, and everybody with this focus feels like they are

fitting in with common wisdom. "Well, Facebook and Pinterest are hot right now. Let's focus on them." In real estate or financial advising, people might be focused on a specific part of the market that seems to be trending. Focusing your marketing efforts on the hot or trending market may feel like you're staying on top, but it will only get you so far.

As you progress into the third column, **you continually strive to get more revenues from the same market that you've always served by improving the same methods.** That feels right for an owner in a mature business who wants to continually improve on their results; it seems like a winning formula to focus their attention on garnering more market share or doing more of the same service that they have been offering, continuing to grow along with the market. In most cases, the businesses that are winning seem to feel that they have their place in the market; they can identify who they serve, and they are focused on just reaching more of those people as they go forward.

In the fourth column, **you dominate a specific target market, focused on the largest check clientele.** Dan Sullivan from The Strategic Coach introduced this concept to me, of focusing on the clients who are the biggest opportunity for you. Out of all the people that you serve, look at the clients that you helped on your roster over the

last 12 months; some of them will be much more valuable than others. Sullivan calls these clients your 'largest checks', the ones who pay you the most money, and those with whom you have the biggest impact. This process describes the ability to narrow your focus, to arrange your business to serve and pursue more of your largest check clients.

You can aim to improve your score on profit activator number one (Mindset Number One, your single target market) by being aware of the total yield that should come from your largest check clients. In looking at the market that you're trying to serve, any constraint means that you only have so much time, capacity, energy or ability to serve the market that you're trying to serve. When you really look at the biggest opportunity, what would your business look like if you organized it to focus on and pursue your largest check clients?

One mortgage company, located in a suburb of Washington D.C. in Virginia, was a perfect example of this concept. Before we started focusing on this company, the workers wore khakis and polo shirts in some inexpensive office space in the suburban market; they just concentrated on serving the middle of the market. Once we went through that exercise of focusing on the largest check clients, the company leaders realized that some of the loans

they serviced were much higher loan amounts held by much easier people to deal with, and these loans were much more profitable to the company. The entire focus of that branch changed to a pursuit of those largest check clients, mostly high-income professionals.

That changed everything about the way that the company conducted business. By narrowing that focus, the people switched from wearing khakis and polos in an office park to sporting Armani suits in an A-class office space in a high-end building, like their clients. The transition was immediate and dramatic, because focusing on and building the entire operation around serving those largest check clients really created a big opportunity. Their revenue and profits increased, and everything about the business became simple because of that narrow focus on a single target market.

Again, focusing on a single target market *at a time* doesn't mean that you are restricted to a never-ending focus on that target market. Companies like Procter & Gamble are a good example of a company that successfully serves multiple target markets, but they serve those markets one at a time and they plan to dominate each of the markets that they enter. That is a great way to focus your attention on improving your score in your single target market mindset.

Mindset Number Two: Compelling Your Best Prospects

This profit activator uses direct response offers to compel your prospects to call you. In column one, **you have no predictable way to generate new leads by relying on manual prospecting, personal promotion, and no-response ads.** Companies in that column show a very distinct pattern; they're really struggling and failing, due to a weakness that can be identified. People often have businesses with an ability to deliver in order to get results, but they don't have a predictable way to generate new business.

That very precarious position is also very frustrating. The company is at the mercy of whatever happens, without a predictable way to get new clients. All of these mindsets build on each other. If your target market is very broad, your advertising and marketing efforts will be very unfocused, because you're trying to serve everybody. You will recognize this pattern. If you can't say with certainty that you have a way to identify the people who could be your best prospects, and compel them to raise their hand so you can start a conversation, you would really be in column one for mindset number two.

In column two, **you focus on branding and building top-of-mind awareness in your marketplace.** That seems like common wisdom,

like the goal that most businesses would strive toward. Owners take that as a cue to create some name recognition and brand awareness so that when prospects or customers think about that category, regardless of their own business type, they think about your business. That can be frustrating because it is often very expensive to create brand awareness.

One of the distinctions for profit activator two, or mindset number two, is the difference between reaching fame versus riches. We focus on branding and building top-of-mind awareness; both of those things are focused on fame, thinking that they will lead to more people calling you. On the other hand, direct response is really focused on building wealth. In column two, that distinction is just a matter of skillfully learning the messages that compel people to raise their hand and identify themselves. If your marketing efforts or ads are just focused on branding without a crystal clear focus that gets people to respond, then there is room for improvement.

In column three, **you almost always bring in enough new prospects annually to increase results.** Many legacy businesses fit into this category; they have been in business for a long time, and have built a great reputation with great clients. Regardless of circumstances, they always seem to have enough business to increase their

results, but they're not completely in control of their efforts and are not able to grow the business in a predictable way. It's not like having your hands at the volume knob of your business; this is what profit activator two can do for you, this mindset of compelling your prospects to call you.

In column four, **you're always able to generate as many prospects as you want, on demand, for a known cost and in a predictable way, like operating a vending machine.** That is really the direction for your aspirations with this mindset. You should be able to reach a certain point at which you know the cost of identifying your ideal prospect by inspiring them to raise their hand, and it can be done at any time in a predictable way.

One perfect example would be to mail out a certain postcard that can be selected specifically for the target audience. I do a lot of work with real estate agents; my company offers a program called Getting Listings. We can mail out a postcard to a very specific target audience, from owners of lakefront homes to condos, or really to any neighborhood. When we mail out that postcard, we know that people will raise their hand.

This is very different from a branding approach.

People will often mail postcards, run ads, and manage campaigns that are just designed to get some visibility for their name. The difference is we're looking at how to get your prospect's name in here. Every time you spend money on advertising or marketing (i.e. postcards, print ads, Facebook ads), you should aspire to making the process act like a vending machine. If you say, "I'd like to get 10 new listings for the lakefront homes in Winter Haven in the next 12 months," you should be able to push that button and know the cost to identify and start a relationship with your ideal prospects. That is the part where your business gets fun.

To improve your score in mindset number two, the first thing to do is focus on turning invisible prospects into visible prospects. After looking at a list of homeowners in an area, or anything that makes a person your ideal prospect, next you should ask, "How can we get our ideal prospect to raise their hand just to identify themselves?" In my opinion, books geared toward your ideal target audience are the very best lead generators to start the conversation – hands down.

With all of the people that we have helped, we have used so many different types of books in our 90-Minute Book process, in so many different ways. *The Breakthrough DNA* book is a perfect example.

We can get someone to start the conversation by asking for a book that indicates the person's level of desire. Once someone has raised their hand for your book or responded to your ad in some way, they have identified themselves as a visible prospect. Once your profit activator two has done its job, now we can move on to profit activator three, which is to educate and motivate.

Mindset Number Three: Educate and Motivate

When we look at the ways that people get into trouble (i.e. rating a lower score on one of these profit activators), it is usually fairly easy to identify the issue.

In column one for mindset number three, **if your prospects are not ready to buy now, they fall through the cracks because your business has no systematic, regular follow-up communication.** Every business owner can relate to that issue, whether they attend a trade show or a networking event, or run ads that generate leads. If customers are not ready to buy immediately, most owners do not have a systematic way to keep in touch with them.

Most small business owners are conditioned to always look for the very few people who are ready to do business right now. More people could be prospects for your business down the road at some point, and that time will certainly come. However, if prospects are not ready to buy right now, the owners are losing out because they don't have a way to orchestrate and nurture that relationship until people are ready to take action and get the results that they want.

In column two, **you believe that just staying in contact over time will produce the sale whenever customers are ready.** Owners often take the passive approach of just keeping in touch through a quarterly newsletter or some level of communication, thinking that whenever the time is right, customers will get in touch. They don't have an orchestrated way to educate and motivate people, or understand the thought process that must be addressed as people are assessing their buying criteria, to see what will make the decision for the customer. The owners just think, "If we keep in touch with people and continue to send them educational materials, we'll be there whenever people are ready."

In column three, **it usually takes an unpredictable amount of time and effort to transform prospects into customers.** Frequently, owners really don't have a measurable metric to find out the length of time that people tend to gestate before they become clients. They don't really start to measure the length of that cycle or process, or pay attention to it. Once you know the length of time that prospects usually take to do anything, you end up being able to predict (like an annuity) the value of the prospects being generated. All of the unconverted leads generated in the past are part of your assets.

You are at the point of winning or transforming in this mindset if in column four, **you have a systematic way to identify ideal prospects and then patiently engage with them over time to find five-star candidates.** Using the real estate example of sending postcards, when people raise their hand to ask for the report on Winter Haven lakefront house prices, you have an orchestrated way to be available when people are ready.

Not every prospect will be ready to list their house right away. People often take a period of time, which could span weeks or years, to get educated and motivated to actually sell the house. It's important to send people a monthly 'get top dollar' newsletter with educational tips on preparing a house for sale, along with all of the new updates on the market. You start to contextually really add value to people as you educate and motivate them.

To really improve your score in mindset number three, it is really important to understand your prospects through all of the generated leads. Ask yourself, "What do they need to know to be convinced?" People often get slowed down from taking action because they are doing all of their due diligence and research, figuring out what to do and what move will suit them. By thinking through all of the many things that your prospects will need to know, to be ready to do

business with you, over a period of time you can just consistently educate them. You can consistently provide new information that will motivate them.

It would also be beneficial to know the gestation period for your prospects. How long do people typically take between the time that they raise their hand and the time that they actually do something? Some of our studies have tracked and monitored the movements of prospects for years. The value of the leads that you have generated today can turn into a multiple when you extend out your ability to communicate with people and provide an offer that will get them to take that first step.

First, you need to decide if you will take this on and orchestrate it based on a method of communication that will work for you. Examine the ways to have a flagship communication that will keep you in constant communication with your clients. It could be a newsletter, a podcast, or a video show. You could send a weekly, monthly, or some regular-interval email to people. Really focus on your flagship communication; it will be the key to being visible to people when they are ready to take that first step.

Mindset Number Four: Making Irresistible First Offers

Within this mindset, people fall into one of two camps, which are covered in the *Breakthrough DNA* book; it acts as a companion to this scorecard. In the *Breakthrough DNA* book, we amplify these principles. People have two mindsets; they're either waiting for the prospect to take action, which is a passive approach, or they often err on the side of being too aggressive by trying to force people to take action now. In the columns, you can see where your business stacks up.

In column one, **you wait for prospects to take the initiative. You are able to take orders when people are ready to buy.** Your staff, or people on the frontline, will often wait for people to come to them; they can cheerfully take orders when people are ready to buy. They're not really trying to encourage people or make it irresistible for people to get started.

In column two, **you consistently check in with prospects to see if you can do anything to help.** It's a very passive approach. In the *Breakthrough DNA* book, I describe the process as if I am inviting you into my living room and saying, "I'm really glad you're here. If there is anything that you want, go ahead and help yourself, there is lots of stuff in the fridge."

By contrast, I could sit you down on the couch and come back from the kitchen with a plate of freshly-baked cookies and ask, "Would you like a cookie?" It would be very difficult for you not to take the cookie. Your prospects are the same way. Understanding what your prospects really want will help you to understand what will be irresistible to them, so you can be there when they're ready to take action.

In column three, **you focus on training the sales team to overcome objections and close prospects right now.** Very successful companies often fall into the category of a sales-oriented culture; after generating leads, their trained sales people are standing by, ready to overcome objections and get people to take action right now. There are lots of ways to get people to take action right away, and these companies make lots of sales based on their 'winning' behavior.

In a way, this can eventually cost these businesses in the long term by doing too much or being too aggressive on the front end, and alienating people who might be ready six months to a year from the initial contact. It's a delicate balance of really being available when people are ready to take action now, but allowing room if they are not ready to take action now.

In column four, **you continually make specific offers to prospects as they become ready, taking a leadership role in all next steps.** If you can skillfully get to a point of making the exact offers that your prospect needs at just the right time, by understanding their motivations, opportunity really lies in this area because the prospects will feel like they are being led in a direction where they want to go. There is an old saying that people are silently begging to be led. That is true for salespeople or entrepreneurs or business owners. In this approach, a staff member may wait for prospects to lead them, to take the initiative, so that they can spring into action and help people get the help that they need. Leadership is really about taking initiative.

Let's use the cookie example. Even if I asked, "Can I help you with anything," it would be uncomfortable for the other person to direct me to get something for them. In a million years, that person would never say, "Actually, would you bake me some cookies?" It doesn't fit. We go to great lengths to keep people from going out of their way for us, even in little things. The way we act in little things is amplified in the way we act in big things. It's a more likely social interaction for someone to ask, "Would you like a coffee?" "Oh, are you having one? Because if you're having one, I'll have one." Nobody wants people to go out of their way and take the initiative that way.

Knowing in advance means taking a leadership role. I may know that you happen to like chocolate chip cookies. If I bake some chocolate chip cookies ahead of time and stack them on the plate, you will be appreciative; you will want those cookies because they are just the right thing. Knowing that is just the first step; if you take the cookie, then there is a really good chance that if I come back in a few minutes with the milk, you will be equally ready for milk. We look at those types of 'cookies', those first steps that will trigger the things your clients will do to move into getting those desired results.

The best thing to improve your score is to really understand those true motivations. What one irresistible thing would make your clients take that first step? Of course, it doesn't have to be just one thing. To use that real estate example of the lakefront postcards, there will be one of three things that will trigger them to take that next step.

They may want to know the specific worth or value amount of their house, so we have a pinpoint price analysis. They may want to know the steps necessary to prepare their house for sale, so we have a room-by-room review to show them the exact steps to get the house ready to sell. If some people had a buyer they would sell, but they're not that motivated to take that action, so we have a silent market. Those three offers have been developed over a lot of time.

Think through those things that would move someone toward taking that first step. If you are positioned in a way that allows you to make those offers to people, it will feel completely natural. To someone who asks for a pinpoint price analysis, we're not saying, "List your house with us." We're offering something: "Find out how much your house is worth using our free service." While you're in the house talking with them, you will naturally progress into the role of helping them sell their house. Look through your particular business and your offers, and find those things that are the natural next steps for people.

Instead of owners sitting back, waiting for a client to call, thinking that their marketing efforts aren't working, owners should try to enter the mindset of their client.

It's evident that these eight mindsets or profit activators build on top of one another. They are all designed around our model of the Before Unit, the During Unit, and the After Unit. For all of the things that we do before the sale, if you imagine it as a separate unit of your business, these first four mindsets are all the things that must be addressed before someone decides to say "Yes" and do business with you.

The next two mindsets are the During Unit, which is the period of time when you actually deliver the result for people.

Mindset Number Five: Delivering Dream Result

If people are struggling or failing in this category, they might find themselves in column one.

You're unable to predictably get consistent results for clients, and then blame the clients for not following the plan. The failing point may not be your plan or your practice for getting the results for people, or the practical steps involved; It may be that the steps are too difficult or confusing for people to follow.

If you really look at the results that your clients are getting, we're looking to see how many people can actually get the results that we want. I always try to amplify the result by focusing on what would be a dream-come-true result for your client, so you can focus on delivering that level of a result. If you seem unable to get a consistent and predictable result for clients, there could be a systemic breakdown, either in the means that you're using (the way that you are able to deliver) or perhaps because the staff are not trained to deliver that result. Really take a hard look at that breakdown to see how your business is actually delivering the result for people.

In column two, **you are usually able to get the result for your clients, but the process and experience may be a little inconsistent.** In this

business, typically people are able to get the result but it may be erratic or maybe communication is not great. The process might break down. If you ever watch the show 'The Profit' on CNBC with Marcus Lemonis, you can see that at some point during the show, he reviews the three ways to think about a business: the product, the people, and the process. Identifying the breakdown that prevents people from getting a predictable result leads to building a plan for improvement.

Most people are in column three - **confident that most of your clients will have a satisfying experience with your product or service.**

Many people with successful businesses are confident that they are able to get the results for their customers most of the time. If there is a problem, it's in the way that you handle it. Even if people are dealt with in a professional way, so that they get the result, the experience may not be as memorable or as good as it could be.

In column four, **your unique process and unique teamwork creates a dream-come-true result for your clients every time.** At this point, all pistons are firing at optimal levels. To move forward, we're looking at how to get people to have an even better result than they could imagine. This is where businesses really can thrive. If you want to improve your score in this category, you could start by really knowing and

understanding the result that would be a dream-come-true for your client. What would be an even better result than they could imagine as a result of doing business with you?

People often constrain themselves in their business by offering a limited way that customers can get something, such as through information marketing. People try to sell a \$349 online course or a \$49 eBook in some way that keeps them focused on the mechanism more than the result. To provide a potential dream-come-true result for people, regardless of the way it is delivered right now or the current pricing or packaging model, it's important to focus on the very best result that you could deliver for people if they would let you do it. Next, figure out the cost to deliver that result and the potential predictability in delivering that result, and then set your pricing based on what it actually takes to consistently get that result.

One of the things that drives profit activator five, or mindset number five, is silently asking yourself a clarifying question: "What would I do if I only got paid once my client received the result?" If you're holding yourself to a standard, that filter will highlight the critical roadblocks in the path of getting the result. If you only got paid when your clients get the result, there might be a very few critical things that need to get done.

So many things get bundled in with a service to make people feel like it has more value or to make it appear as if it is a bigger bundle of services or bigger product than it really is. If you really focus on the result without filtering it through the way that it is currently done, that will change your viewpoint. If you really did reach a point of constantly looking for ways to drive predictable results for people and remove the friction in doing so, that will give you the confidence to make a stronger offer, which will have a trickle-down effect on all of these profit activators or mindsets.

In mindset number four, if you can definitely get a result that is some multiple of the amount of money paid by your customer, you will then have the confidence to truly make irresistible offers. Then you can fully focus your attention on the target market that would be best suited for the result that you're able to get. Gaining clarity on your core objective while achieving the result is the thing that will drive your score in mindset number five.

Mindset Number Six: After-Sale Service

In this situation, you have an opportunity to surprise and delight people, which goes beyond the part of the service or transaction that people would perceive as the thing they paid for. Everything depends on your mindset about this particular category.

In column one, **once the transaction is made, you go to the next prospect without any additional service offer such as testimonials or referrals.** Some businesses are oriented around gaining that one transaction, especially in their beginning stages or when the owners aren't confident about being in their business for the long term. This is especially true in a situation that doesn't offer a lot of repeat business, or when the repeat business will happen years down the road.

Many times, realtors initially make the mistake of doing everything they can to help people find the house; they go to the closing, they get the check, and then they're out looking for the next person without even continuing that relationship. Realtors often don't realize that there are strategic objectives in addition to the core objective of selling a client's house, or getting them the expected result that they were hired to get. The strategic objectives are best

framed in a question: “How can we maximize the results that people are getting and maximize our opportunity to serve them?”

In column two, **you feel that each customer's value lies mostly in the first transaction, afterward you immediately move on to your next customer.** Gaining focus at that point will really determine the amount of effort you put into continuing the relationship based on how much you feel like you can continue to add value for people.

In column three, **you try to maximize transaction value with up-sell offers or incentives on future orders placed now.** Sometimes people have already taken that approach of maximizing everything into one transactional period, because they realize that they really only have one opportunity for working with that client or those clients.

In column four, **each client experience leads to the next client and sets the stage for a lifetime relationship.** After the period of the During Unit, the period of time when you will be in the closest relationship with them (in constant communication, collaborating with them, celebrating when they get the result), it just feels so anticlimactic if they get this result while having a great experience with you, and then the relationship just drops off cold turkey.

There is a resulting sense that you were only in the relationship because you were getting paid for it.

In every business, in every transaction, there is a transactional part of the business. Everybody would recognize this as a dividing line. If someone leaves the closing table from a real estate transaction, and you have been paid the commission check, maybe the transaction is over but hopefully the customer will stay in touch and do business with you again. Now, for the person who just bought that house or car or engaged in that financial plan (depending on your business), the next 30 to 90 days after someone makes a large purchase is the time when they will be most excited about it. They will be introducing the new house or car, or talking about whatever they did with their closest friends in their inner circle; there are so many opportunities for people to introduce you to your next client.

Every little thing that you do, after the customer perceives that you have been paid for the initial transaction, is really perceived in a different way. It is perceived in a relationship way. For example, if you just bought a house and then I pop in after the closing to see you on the next weekend, or I introduce a handyman to help you, or I bring a gift basket, any contact after the transaction is a surprise and a delight. The customer perceives that you are doing this

because you want to develop a relationship. It's important to focus on the opportunities to do that by finding the dividing line in your business. Where is the division between the transactional part and the continuation of the level of service that can be offered to people?

Another thing you might do to improve this mindset is to identify and know your strategic objectives. Can you identify and arrange the next step with people through communication, through visits or continuing the relationship? Perhaps they are ready to take the next step with you now; you may have additional offers for working with them, or you understand that now is a great time to get referrals and testimonials from your clients at their happiest, when they're talking constantly about the recent transaction.

I see this profit activator scorecard as a qualitative approach. When you really intend to improve your score, the next step for progression is to take a quantitative approach. Which metrics will show improvement in the During Unit? There is a constant and never-ending improvement cycle in which we measure both the qualitative assessment of our place on this scorecard, and then getting really serious about adding some quantitative measures to be reviewed each quarter as we track our progress. Let's move into the After Unit, which includes two profit activators and two mindsets.

Mindset Number Seven: Nurturing Lifetime Relationships

You can see where you fit on this scale just by looking at the language used in each of the columns. Just to set the stage, the After Unit is the part of our business that really deals with nurturing lifetime relationships with our clients and orchestrating referrals. We should be able to see the value of the After Unit if it was a standalone unit of our business. Put another way, if we just shut the doors and stopped taking new clients, what would be the value or the impact of our After Unit?

In the first column of Mindset Number Seven, **you have no database or CRM or communication with your clients; you just hope that they return.** Many businesses fall into this category, from restaurants to retail stores. In this category, you keep the doors open so that people come in, they buy lunch or a café item, and then they leave. As an owner, you don't have any idea who they are or any way of communicating with them, and you just hope that they had a great experience and will either come back or tell all their friends. "Hey, ya'll come back now." If that is the category where you are right now, then you should ask yourself some questions to understand the areas where you are missing out.

In column two, **your personal and business success is measured only in terms of transactions, revenues, and profits rather than in terms of creating asset value.** You're just reviewing the number of transactions calculated on a month-to-month basis (or per day or per week), and measuring success in that way. The business is focused on the present, not on the future, without maximizing the value of everything that was done in the past.

In column three, you have progressed to a traditionally successful role. **You're generally aware of the lifetime value of a client, but you measure it historically.** Sometimes businesses know the number of their clients overall or how much business has been done with those clients, and they track the value of that business by looking in the rear-view mirror. The owners track the metrics that guide the process, but don't really take a forward-looking view as the asset that will predictably generate an amount of revenue each year.

In column four, **you continually measure and increase the "return on relationship" of your entire client portfolio, which is your most valued asset.** If you're winning in this column, you realize that the After Unit is the equity of your business. It's the reward for all of the years and the effort that you put into building those relationships. "Return on relationship" is placed

in quotes, because that is a physical metric to be reviewed. Again, your After Unit happens whether you are aware of it and consciously directing your efforts to improve it, or whether it's just happening, overlaid onto your existing business.

Whether your business is dentistry or chiropractic care, or a professional practice such as accountancy or real estate, the “return on relationship” comes from a few factors. Take the number of people that you've served (who would fit in that After Unit category), then look at the total amount of revenue generated by that group of people, and ask this question: “Out of all of the business that I did in the last 12 months, how much of that business came from my existing clients?” That answer is called your Return on Relationship; it's just one piece of your After Unit, which also includes orchestrating referrals.

In order to get the right lifetime relationship mindset, start with discovering your position right now by measuring the impact of your After Unit on your business. The metric used is Return on Relationship. It's easy to calculate if you have all of the numbers to plug in, but most people don't separate the tracking sources that show where their business came from in that way. This is an incredible way to focus on improving that number by first developing an awareness of it.

Another way for you to improve this score is to focus on being an advocate for your category. The actual business is often just one part of the broader category where you live. Real estate agents are involved in the transaction of buying and selling a home, but they also hold the category of “Home Ownership” because they have gotten people to enter the situation of home ownership. If you treat your role as an advocate for home ownership and home owners, that awareness can drive you to introduce all of the other things that are part of that category. You can create a network of people who provide other services in that category.

The word “advocate” is being used intentionally. Think about all of the number of things that will happen under that broader category of home ownership, from home improvements to home maintenance. If you look at your role as the advocate who can introduce your customers or clients to these service providers, if you are the first person they think of regarding anything to do with their home, that is the real lifetime relationship value. You are building that relationship over time.

You can also align with other people in that category who have the same mindset; together, you can work to treat each other's clients as advocates. That will improve the number of referrals you get from other businesses within

the same category, by taking the relationship built by other businesses so that their clients are directed towards you when they have a need that you can fill, and vice versa. It's always a good idea to be positioned as the leader of a category, especially among the other complementary businesses, because those other business owners don't always take a step back to identify and organize the category. Everybody is so focused on their own little cog in that grander wheel; they are not really focused on taking a leadership role and building relationships, or focusing on being a market-maker.

Mindset Number Eight: Orchestrating Referrals

While Mindset Number Seven was about nurturing relationships and getting repeat business, orchestrating referrals is a specific category. In column one, **you get sporadic, unpredictable referrals that just happen. No effort exists to orchestrate, recognize, or encourage the flow of referrals.**

Moving into column number two, you have the best intentions. **You stay in touch with your existing clients in conventional ways without consciously and strategically measuring the results.** Real estate agents may send a calendar or a fridge magnet for people to use during the year; they are staying in touch with people but without any sort of strategic element, not realizing their opportunity to develop a relationship with people.

In column three, **you focus on increasing referrals by constantly asking for and incentivizing referrals.** In this column, people understand referrals and think that they need to incentivize people to give them referrals, so they focus on creating referral reward programs. However, the way it is done often seems like the owner is doing the customer a favor.

In column four, where you're transforming in this mindset, **you proactively orchestrate your referral system to create and measure referrals every month like clockwork.** You realize that referrals are a wonderful thing, so you have an opportunity to measure what is actually happening. In reviewing referrals, first put them into categories of passive referrals or reactive referrals. In passive referrals, people just call and said, "I'm a friend of Susan. Can you help me sell my house?" Reactive referrals would happen when someone calls to say, "My friend John is thinking of selling his house. You should give him a call."

Measuring the orchestrated referrals means consciously working to identify a specific person, or a specific category of person, and orchestrating situations for your clients to introduce you to those types of people. In order to orchestrate those referrals, you can study and understand the psychology of why people refer and the mechanics of how referrals actually happen.

On the psychology side, it's important to overcome the idea of people offering referrals as a favor. That's really a limitation that puts you in a position of weakness. When you understand that people refer because it makes them feel good, that is much more empowering.

Regarding the mechanics of referrals, all referrals happen as a result of conversation. That really gives you an opportunity to think through the high-probability conversations in which people might get engaged.

To use real estate as an example, over the next 12 months it is highly likely that everybody in your After Unit will hear someone talking about selling their house, getting transferred, buying their first home, or buying an investment property. Your clients will get into all kinds of conversations. Then build your communications around orchestrating referrals in those categories.

For this we use a wonderful tool called **The World's Most Interesting Postcard** (see www.gettingreferrals.com). One side just shows very interesting facts and information. On the other side, we orchestrate referrals by using a simple formula. "Just a quick note, in case you hear someone talking about _____. If you hear someone talking about _____, give me a call or text me and I'll give you something to give to them." In the real estate example, we might say, "Just a quick note, in case you hear someone talking about selling their house. If you hear someone talking about selling their house, give me a call or text me, and I'll get you a copy of my book to give to them, *How to Sell Your House for Top Dollar Fast.*"


Of course, we add more words to that little orchestration, but the essence is to plant the seed in people's minds so they will notice certain conversations. In order for a referral to take place, people have to notice conversations about real estate, or money, or any other category. They have to think about you and introduce you into the conversation. All three of those things firing at once is really the whole purpose of your profit activator number eight. This whole mindset focuses on skillfully orchestrating more referrals and doing it in a way that measurably makes a difference.

Here's what to do next...

To continue improving your scorecard results: here are three ways you can take your thinking to the next level.

- Download “Breakthrough DNA”, the companion to this scorecard book, for free at **BreakthroughDNA.com**
- Watch the introduction video on the site where I introduce the mindset of the eight Profit Activators to you in more detail.
- Join the Breakthrough DNA online program where we walk through each Profit Activator in detail to help you create the breakthrough you need to take your business to the next level.

Get started now at
BreakthroughDNA.com

 AudioBook download at
BreakthroughDNA.com/scorecard

It can be really helpful to see the whole process at one glance and be able to rate yourself.

Awareness builds momentum; knowing where you are and where you need to go can mean more money for your business and happier clients. I really look forward to helping you raise your score on your profit activator scorecard over the coming quarters.

Most people think creating breakthroughs involves significant organizational change, but the truth is, by making small changes across each of the 8 Profit Activators you can create a significant breakthrough to take your business to the next level.

If you want to join me in one of our small group mastermind events to go deep into applying the 3 Profit Activators in your business, email me at **dean@deanjackson.com**

Your Profit Activator Scorecard

While looking at each of the columns, see which one of the three options resonates with you. A “one” would indicate this as your weakest option, but a “three” might mean you are in that column but almost in the next column, and it is easy to see where you can make the transition to the next column. Is there a weakness, are you solidly entrenched in this column, or are you on the verge of moving to the next column?

The assessment offers a qualitative view, especially in column four and the differential points between 10 and 12.

If you are at point 12, you are completely focused on that mindset, whereas if you are at point 10, there is room for improvement.

By grading yourself on a quarterly basis, you can make improvements in the quarter. You can assess your position, and then set your objectives and focus for the next quarter.

Mindset: Select a Single Target Market	
You target everyone and anyone, taking what you can get, casting the widest net possible.	1
	2
	3
You focus your marketing efforts on whatever is the hot or trending market right now.	4
	5
	6
You continually strive to get more revenues from the same market that you have always served, improving the same methods.	7
	8
	9
You dominate a specific target market focused on “largest check” clientele.	10
	11
	12

Score:	
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Mindset: Compelling Your Best Prospects	
You have no predictable way to generate new leads relying on manual prospecting, personal promotion, and no response ads.	1
	2
	3
You focus on Branding and building Top of Mind Awareness in your marketplace.	4
	5
	6
You generally always have enough new prospects every year to increase your results.	7
	8
	9
You're always able to generate prospects predictably. On demand, for a known cost, as many as you want, like a vending machine.	10
	11
	12

Score:	
---------------	--

Mindset: Educate and Motivate	
If prospects are not ready to buy now, they fall through the cracks, and you have no systematic regular follow-up communication.	1
	2
	3
You believe that just staying continually in contact over time will produce the sale – whenever they are ready.	4
	5
	6
It usually takes you an unpredictable amount of time and effort, with no systematic approach, to transform prospects into customers.	7
	8
	9
You have a systematic way to engage with new prospects to find “five star candidates” and to patiently engage them over time.	10
	11
	12

Score:	
---------------	--

Mindset: Irresistible First Offers	
You wait for prospects to take the initiative, able to take orders when people are ready to buy.	1
	2
	3
You consistently “check in” with prospects to see if there is anything you can do to help.	4
	5
	6
You focus on training the sales team to overcome objections and close prospects right now.	7
	8
	9
You continually make specific offers to prospects as they become ready - - taking a leadership role in all next steps.	10
	11
	12

Score:	
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Mindset: Delivering Dream Result	
You are unable to predictably get a consistent result for clients – and then blame the clients for not following the plan.	1
	2
	3
You are usually able to get the result for your clients, but the process and experience may be a little inconsistent.	4
	5
	6
You are confident that most of your clients will have a satisfying experience with your product or service.	7
	8
	9
You have a unique process and unique teamwork that gets a “dream come true result” for clients every time.	10
	11
	12

Score:	
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Mindset: After Sale Service	
Once the transaction is made, you are on to the next prospect, with no additional services offered -- so no testimonials or referrals.	1
	2
	3
You feel that each customer's value is mostly the first transaction, and then you immediately move on to the next new customer.	4
	5
	6
You try to maximize transaction value with upsell offers or incentives on future orders placed now.	7
	8
	9
Each client experience leads to the next client and sets the stage for a lifetime relationship.	10
	11
	12

Score:	
---------------	--

Mindset: Nurturing Lifetime Relationship	
You have no database or CRM, no communication with clients, and just hope they return.	1
	2
	3
You generally measure your personal and business success only in terms of transactions, revenues, and profits.	4
	5
	6
You are generally aware of and measure the Lifetime Value of a client but measure it historically.	7
	8
	9
You continually measure and increase “return on relationship” of your entire client portfolio, which is your most valued asset.	10
	11
	12

Score:	
---------------	--

Mindset: Orchestrate Referrals	
You get sporadic, unpredictable referrals, no effort to orchestrate, recognize, or encourage the flow of referrals.	1
	2
	3
You stay in touch with your existing clientele in conventional ways without consciously and strategically measuring the results.	4
	5
	6
You focus on increasing referrals by constantly asking for and incentivizing referrals.	7
	8
	9
You proactively orchestrate your referral systems to create and measure referrals every month like clockwork.	10
	11
	12

Score:	
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The Profit Activator Scorecard

Selecting a Single Target Market	
Compelling Your Best Prospects	
Educate And Motivate	
Irresistible First Offers	
Delivering Dream Results	
After Sales Service	
Nurturing Lifetime Relationships	
Orchestrate Referrals	

Score:

The logo features a stylized orange book icon on the left, with the text "90-Minute Books" in orange to its right. The "90" is white and set within the orange book icon.

90-Minute Books

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Get started at

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