



*Cold Fusion marketing
About Membership in a Dedicated
Rainmakers' Forum*



***A detailed
overview
of our
Proprietary
Client-Building
Process for
Forum Members***

The term "Cold Fusion" is borrowed from physics, and refers to "generating more useable energy from a system than you input into it". In our case: more new clients realized per energy unit expended by you than any other marketing strategy attempted.

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Capsule Summary

Participants in dedicated Rainmakers' Forums enjoy a client-building process that was perfected over a sixteen-year period. Consisting of a group of between four and eight professionals and business leaders in synergistic fields, Forums are very different from business network platforms:

- **Selectivity:** Only the most successful leaders in their fields are admitted.
- **Real Client Analysis – Not Weak Referrals:** Participants submit profiles of clients (not identified by name) for professional analysis. New servicing opportunities are uncovered for all.
- **Appointment-Setting with Prospective Clients:** Referrers and Rainmakers staff assure that appointments are arranged with prospects.
- **Accountability:** Detailed referral performance metrics are maintained, assuring balanced contributions by participants.
- **Referral-Tracking:** A sophisticated system follows referrals through from inception to ultimate disposition. Referrals are not lost through the cracks.
- **Professional Facilitation:** The Rainmakers' Forum provides trained facilitators to assure Forum success, measured by referrals.
- **Spontaneous, Organic Referrals:** The Rainmakers' Forum reinforces client identification for and by all participants. Referrals arise in this spontaneous manner as well as through reviews of actual client profiles.



Frequently Asked Questions About Our **Rainmakers' Forums**

1) What are they? Groups of between four and eight professionals and business leaders dedicated to helping each other develop more business.

2) How are they different from business networks? They are unique in several respects. The capsule Summary on the previous page explains the unique features.

3) Are there meetings? We insure diverse exposure for Rainmakers so that they enjoy adequate referral opportunities:

- **Individual Forum Meetings:** Participants meet periodically to review client profiles and identify referral opportunities for each other.
- **Combined Meetings:** There are ten meetings annually to convene Rainmakers from various Forums and other programs in one location. Focus groups, problem-solving sessions and guest speaker presentations are offered. These meetings are optional.
- **Special Summits:** Rainmakers may choose to attend breakfast, lunch or dinner meetings with both Rainmakers and non-members. Client profiles are reviewed and referrals exchanged. This is an effective way to further expand business development.

4) How are referral opportunities identified? We centralize discovery and distribution of referrals. In this way they become much more likely to convert into real, live prospect presentation opportunities.

- Upon request, Forum participants submit detailed actual client profiles to our Center. Accountants and attorneys skilled in evaluating client needs review the profiles. To preserve confidentiality, client names and other information that would make identification easy are omitted.
- Interviews with the submitting Forum participants uncover potential servicing opportunities for other Rainmakers.

In addition to the client profile analysis process, Rainmakers facilitators continually reinforce the client identification tactics by and for each participant. As a result, referrals are frequently generated spontaneously.

5) How are referrals distributed? Prior to periodic Forum meetings, Client Profiles are sent to each Forum participant. The profiles are then analyzed during meetings. Referral opportunities are discussed. They are categorized as follows:

- “Current”: An introduction for a Rainmaker to a prospect should occur now.
- “Future”: An introduction will be set for a targeted future date. The Rainmakers system converts these to “Current” status at the appropriate time.

Frequently Asked Questions About Our Rainmakers' Forums

6) How are prospect appointments set? At the appropriate time, Referral Tracking Reports, with details, are e-mailed to all participants. .

- They familiarize themselves with the opportunities designated for them.
- When ready, the “referee” contacts the referrer to devise “Leverage Points” (tactics to create urgency with a prospect to schedule a meeting). If difficulty is experienced, a Rainmakers coach steps in to help.
- Finally, the referrer sets a meeting for the “referee”. If the referrer is unable to do so, Rainmakers staff makes the arrangements for a modest fee charged to the referrer.

7) How many referrals can I expect? Our goal is to arrange between twelve and twenty-four qualified referrals annually for each Rainmaker. It is important to recognize that these are not “leads”: they are highly qualified recommendations in which specific needs are uncovered and appointments are set. The closure rate is substantially higher than can be expected from “leads”.

8) How do I develop a comfort level with people who are referred to my clients? You are asked to perform your normal due diligence steps. You also asked to spend time with them at periodic Rainmaker-sponsored meetings and events, as well as in one-on-one meetings. You can also “qualify” a referral: *“I have not worked directly with _____ before, but s(he) was highly recommended to me by _____.”*

9) What are the fees? This is not a “one size fits all” program. Fees are determined based upon the degree of difficulty securing referrals and level of participation in Rainmaker various marketing initiatives.

Client Profile Report – Affluent Individual/Family

Note: Please complete as much of this information as possible and e-mail the report to The Rainmakers' Forum at info@rainmakersforum.com Completion should not require more than fifteen minutes.

Report Date: 7/21/10

Person Representing Client Being Profiled: Alexis Jones, CPA

Client Occupation: Owner: of chain of electronics stores

Approximate Annual Income: Approximately \$700,000

Approximate Net Worth: Between \$14 and \$16 million

Age Range: Between 50 and 55

Marital Status: Married

Children, Sex and Ages: Two boys, 18 and 23

Challenges You Observe That motivated you To Profile This Client:

- Highly appreciated real estate of store locations owned by C Corporation. Client wants to distribute the property without adverse tax consequences.
- Health benefit costs for employees increased by 30%.
- Children not capable of managing business and owner wants out.
- Owner has serious health problems.
- Profitability of stores being squeezed by large chains.
- Fire insurance too high.
- Owner's parents suddenly need around-the-clock care.

Services Presentations and Second Opinions that you Believe Are Warranted: Financial planner, trusts and estates attorney, wealth advisor, business attorney, benefits consultant.

Additional Information Useful In Determining Potential Needs

We understand that you may not know the answers to all of these questions. Please answer as many as you can because the information is very helpful in determining potential needs that can be referred to representatives of various fields.

Please place an "X" after any statement that matches your client being profiled.

Going through or contemplating a divorce.

Suddenly acquired wealth. X

Recently married or divorced.



Person Representing Client Being Profiled:

Continued from page 1:

- Educations to fund. X**
- Health or disability challenges.**
- Is retiring and has substantial wealth. X**
- Had a significant damage award.**
- High earner, entertainer or sports personality.**
- Family experienced recent loss.**
- Unhappy about investment returns. X**
- Individual acquiring expensive “toys” (boats, cars, airplanes, etc.). X**
- Individual acquiring real estate. X**
- Family with nannies.**

Note to person representing client: As your client profile is actually presented at the “Focus on Referrals” session, please be open to the suggestions of participants, regardless of the field they represent.

Note to other participants reviewing this report: Please review this report carefully and formulate all the questions you would like to ask that may lead to a recommendation to use your services.

Note: Please complete as much of this information as possible and e-mail the report to The Rainmakers' Forum at info@rainmakersforum.com

Report Date: 7/21/10

Person Representing Client Being Profiled: Harold Jackson, CPA

Nature of Business: Law firm

Approximate Annual Income: Approximately \$7,000,000

Locations: Offices in NYC and Metropark, NJ

Challenges You Observe That motivated you To Profile This Client:

- Health benefit costs for employees increased by 30%.
- Profitability of firm down by 10%.
- IT infrastructure is antiquated, but available cash is low to address the problem is limited.
- Firm seeking lower-cost space.
- Bank is requesting reduction of line of credit.
- Receivables are growing.

Services Presentations and Second Opinions that you Believe Are Warranted: Real estate broker, benefits consultant, banker, IT consultant, and law firm management consultant.

Note to person representing client: As your client profile is actually presented at the “Focus on Referrals” session, please be open to the suggestions of participants, regardless of the field they represent.

Note to other participants reviewing this report: Please review this report carefully and formulate all the questions you would like to ask that may lead to a recommendation to use your services.

Additional Information Useful In Determining Potential Needs

We understand that you may not know the answers to all of these questions. Please answer as many as you can because the information is very helpful in determining potential needs that can be referred to representatives of various fields.

Please place an “X” after any statement that matched your client being profiled.

Company requiring a work-out.

Client unable to pay accounts payable or taxes on a timely basis.

Company being purchased or sold. X

New or emerging company.

Merger or acquisition potential.

Changes in ownership. X

Launching new product or service.

Person Representing Client Being Profiled:

Continued from first page:

Company seeking a firm with cross-border contacts. **X**
Company installing new owners/managers.
Company requiring some form of non-competition protection.
Violations of non-comp agreements. **X**
Company with product liability issues.
Partner/shareholder disputes. **X**
Dissatisfied with current contracts or agreements.
Has a new invention.
Foreign company opening US subsidiary.
US company opening foreign markets.
Company with IP that may not have protected it. **X**
Company wishes to manufacture goods in foreign country.
Company purchasing or selling real estate.
Buying or selling business.
Company being taken over by next generation.
Company complaining about the cost of benefits. **X**
IT infrastructure old/outdated. **X**
Experienced hacking/data theft.
Rapidly growing or contracting company.
Bank is pressuring company regarding lines of credit and loans.

Note to person representing client: As your client profile is actually presented at the “Focus on Referrals” session, please be open to the suggestions of participants, regardless of the field they represent.

Note to other participants reviewing this report: Please review this report carefully and formulate all the questions you would like to ask that may lead to a recommendation to use your services.



REFERRAL TRACKING REPORT - ILLUSTRATION

Referral Number	Date Identified	Referrer/ Recipient	Referral Description/Notes	Leverage Points	Target Date	Final Outcome
1	4/5/2010	Prince Marsh	Consulting firm addressing consumer brands valuations.	Introduce tax partner to address special needs issues for child.	26-Apr	New Client
2	4/5/2010	Prince Burke	Same as #1	Same as Marsh. They will team on this one.	26-Apr	Pending
3	4/5/2010	Burke Prince	Commercial RE broker. Introduce Prince as independent general counsel	Prince represents clients in Rockefeller Center. Prospect would have interest in meeting them.	4/26/2010	New Client
4	4/5/2010	Marsh Sandoz	Avionics testing equipment manufacturer: NY and Israel. Requires space for growth.	To be determined. Sandoz not present.	4/26/2010	New Client
5	4/5/2010	Marsh Silver	Same as #4. Suggested that an IP review be undertaken.	To be determined. Silver not present.	4/26/2010	Pending
6	4/5/2010	Marsh Burke	Same as #4. Suggested financial planning review.	Burke on board of Weizman Institute of Sciences. Could be good connection for both social service and Israel connections.	4/26/2010	New Client

Setting Appointments with Prospective Clients

The Golden Rule of Referrals: Make sure your referrals lead to appointments just as you would like your referrers to arrange yours.

The facts:

- *Many “referrals” are really nothing more than leads.*
- *The majority of “leads” “fall out”.*
- *Time is wasted, frustration mounts and people lose their enthusiasm.*
- *It is very difficult to secure a bona fide, highly qualified referral, and they should be treated like precious gems.*
- *Identifying one is a waste of time if there is not adequate follow-up to set a presentation meeting.*

The Rainmakers’ Forum Policy regarding converting uncovered opportunities into presentation meetings:

- *Rainmaker members want to know that “referrals” they receive will actually result in a presentation opportunity.*
- *There is a quid pro quo: Rainmakers wanting such assurance for them should be willing to be responsible for securing presentation meetings for “referred” Rainmakers.*
- *Referrers are responsible for following up to help referees meet with prospects referred by them. If they choose not to do so, The Rainmakers’ Forum steps in to assume the responsibility. In that event the referrer is charged a fee. We only wish to provide this service when absolutely necessary and encourage referrers to personally assist the referees.*

Leverage points: The Critical Appointment-Setting Ingredient.

Issues that touch a prospect personally or relate to new business result in meetings quickly. Typical product/service presentations receive lower priority and are much harder to set.

When you receive a referral, it is your responsibility to give your referrer the ammunition to make the appointment-setting as easy as possible. Leverage Points accomplish this.

See the discussion and examples of Leverage Points at the end of this material.

Prospects are converted to clients because of pre-meeting planning.

The referrer and referee should always connect before meeting attempts are made. Various leverage points should be considered, and the referee should have a good understanding of the prospect’s current situation and perceived needs.

Appointment-Setting Approaches

These suggested tactics are listed in order of effectiveness and in a declining order of priority:

I) The Joint Meeting

In this scenario, the referrer contacts the prospect. Using appropriate Leverage Points to instill a sense of urgency in the prospect, the referrer sets a meeting for the three parties to meet.

As an example of a script (VM or E-mail):

“Jack, I share clients with an estate planner who knows several people who are on the board of the school that you want your daughter to attend. I would love to host a breakfast to get you together. This could be very helpful for you to learn about acceptance criteria at the school. And, maybe you should consider a fresh pair of eyes to review your estate plan.”

Another example of a script (VM or E-mail):

“Alexis, I share clients with an accountant. Besides being very creative, he is seeking an attorney for a client. This could be a good business-building opportunity for you. And, maybe you should consider a fresh pair of eyes to review your accounting requirements and fees.”

Don't drop the ball: The referrer is expected to follow through and be persistent until such time as a meeting is set. If not, the opportunity is likely to be lost forever. It is also the responsibility of the referrer to follow up later to make sure the meeting actually took place. If not, the process should commence again.

II) The Three-Way Conversation

In this scenario, the referrer contacts the prospect to set a three-way conference call.

Using appropriate Leverage Points to instill a sense of urgency in the prospect, the referrer sets a time for the other parties to meet.

As an example of a script (VM or E-mail):

“Jack, I have Sherry Lansing on the phone with us. I share clients with Sherry, who is an estate planner. Sherry please say hello. Jack, Sherry knows several people who are on the board of the school that you want your daughter to attend. I think the two of you should get together. This could be very helpful to learn about acceptance criteria at the school. And, maybe you should consider a fresh pair of eyes to review your estate plan. So, while I have you both on the phone, let's set that meeting.”

Don't drop the ball: The referrer is expected to follow through and be persistent until such time as a meeting is set. If not, the opportunity is likely to be lost forever. It is also the responsibility of the referrer to follow up later to make sure the meeting actually took place. If not, the process should commence again.

III) The Three-Way E-Mail Approach

This is basically the same as II) above. The only difference is that the communication is accomplished through e-mail.

Leverage Points to Secure Meetings with Prospects

Getting on the “Front Burner” instead of being treated as another vendor.

Issues that touch a prospect personally or relate to new business result in meetings quickly. Typical product/service presentations receive lower priority and are much harder to set.

It is difficult to make a meaningful referral to someone. Arranging for a presentation or second opinion meeting for your “referral alliance partner” is challenging at best. Many prospect meetings “fall out” or are simply placed on the “back burner” only to fall out later. A better way of securing these is to first instill a sense of urgency in the prospective client. The best way: make the prospect *want* to meet your “referral alliance partner”. A carrot has to be dangled. Urgency is created and a meeting actually occurs. This begins the prospect cultivation process for your “referral alliance partner”, leading to opportunities for your “referral alliance partner” to present and close. Following are examples of this added value approach. It is incumbent upon your “referral alliance partner” to become very creative and give you the ammunition you need to set the meeting. When done well, the ratio of meetings set to meeting attempts rises dramatically.

Scripting for the referrer to recommend a Rainmaker for a presentation or second opinion meeting;

“I share clients and collaborate with a _____ whom I think you should meet because...

He has a client seeking _____ and he wants to see if your organization offers a solution.

She can introduce you to the decision makers at that _____ that is an ideal client for you.

He has financing sources that might reduce your borrowing costs.

She is on the board of a company working in your space, and she could introduce you to several high-end prospects.

He has a lot of great contacts that would help you establish your business in (new geographic location).

She represents several clients that should know about your services, and she wants to schedule meetings for you.

His (father/mother/sister/brother) is very influential at _____ and could open doors for you.

She has investors seeking a place to put their money to work.

His company services the same client types that you do, and he is seeking new connections to refer to.



ILLUSTRATION: This information is included with every Client Profile.

Leverage Point Identification Aid

Note: As explained in related materials, leverage points are used to create urgency with a prospect, thus shortening the time for setting presentation meetings. Leverage points generally fall into two categories: 1) Improve the personal life of a prospect/decision-maker. 2) Lead to new business for the prospect. The information provided here is meant to make it easier for a “referrer” and “referee” to identify an effective leverage point. This information is developed by the Rainmaker preparing the Client Profile. While this aid should be as complete as possible, we do not expect all of the information to be available.

**Category of Client (affluent family member/individual, business owner, decision-maker):
Business owner**

Marital status: Married

Approximate age: Between 55 and 60

Children and approximate ages: 4, all in their twenties

Approximate ages and health status of parents (both spouses): Client has mother in eighties with dementia. Father is deceased. Do not know about spouse’s parents.

Special, interests, hobbies, etc.: Golf and sailing

Ideal client/customer: Wealthy families and business owners

Ideal “strategic contact”: Accountants and business/transactional attorneys.

Interested in connections/business in other geographic markets? Yes

Where? Florida and Puerto Rico

Charitable organizations of special interest: Alzheimer’s Association

Interested in “business partners”, acquisitions or sale? Might buy a business in Florida

Interested in investors? No

Interested in re-financing? Do not know

**Indicate any other relevant information that might be useful in identifying leverage points:
Very involved in raising funds for Alzheimer’s research. Interested in talking to other affluent families who share similar interest. This would be a big leverage point!**



About Our President & Client Analysis Facilitator



His Books and Audio Programs

*How to Get CPAs to Refer You to Their Clients
From Technician to Rainmaker
Upgrading & Expanding your Client Base
Rainmaker Flight School
Five Keys to Motivation Mastery
Rainmakers Flight Plan
Tax Season Power Marketing*

Bruce D. Stout, CPA is the President of The Rainmakers' Forum and a well-known business and personal development coach.

Career Experience

Price Waterhouse & Co.
Richards, Ganley, Fries & Preusch, CPAs
Dutch & Franklin, CPAs (Partner)
Bruce D. Stout, An Accountancy Corporation (Entertainment business management firm)
Pillar Productions, President (Film, TV and music production company)
The Rainmakers' Forum

Current and Past Affiliations

AICPA, NYSCPA, NYSSCPA, CSPA, American Management Association, IAFFP, Advisor to Machinery Export Management Association, World, Trade Institute

Served on Boards

National Association for Ileitis & Colitis
Aids Foundation
Sickle Cell Anemia Association
Approximately twenty corporate and banking boards

Other Items of Interest

Author of five books (strategic planning & marketing) & Rainmaker Flight School audio series
Spokesperson for Transamerica
Experienced SCUBA wreck diver
Pilot
Appearances on CNN and CNBC
Talk show host
Musician