

# TAP MEETING AGENDA

TAP = Talk About Partners (60 minutes)

## **CELEBRATE THE WINS (5-10 MINS)**

- The meeting leader highlights recent relational successes—new partners, introductions, or referral deals.
- Let others share, too, while you focus on celebrating behaviors that align with your relationship-building goals.
- It's ok if these behaviors haven't led to immediate results. Recognize what you want repeated.

## **WHO'S EXCITING RIGHT NOW (10-15 MINS)**

- One-by-one, each accumulator shares the referral partners currently creating buzz.
- Why are they exciting? What actions have been taken recently to nurture these relationships?
- Share and/or brainstorm plans to strengthen these partnerships further.

## **WHO'S EXCITING RIGHT NOW (10-15 MINS)**

- Again, one-by-one, accumulators shift focus to partners with future potential.
- Why are they about to become important? What actions will be taken to engage or energize them in the near future?
- This section is forward-facing and designed to inspire possibilities and public accountability.

## **BRAINSTORMING & GIFT PLANNING (5-10 MINS)**

- Dive into creative ways to enhance partner relationships.
- Discuss potential gifts, personalized gestures, or experiences. What roadblocks exist?
- Brainstorm ideas and solutions (such as the R.I.C.H. PLATFORM GIFT CATALOG!)

## **SYSTEMIC ISSUES & PROBLEMS-TO-SOLVE (5-10 MINS)**

- Address any barriers or challenges occurring within your 3 systems.
- This could include technology failures (we've had plenty of those), delayed peak moments, or logistical challenges ("we need their mug info.").
- Identify solutions and assign ownership. We call this 'the issues' list. We wish it were empty – it rarely is.

## **ACCOUNTABILITY & NEXT STEPS (5 MINS)**

- Summarize the key actions for each team member.
- Ensure everyone has clear tasks and action steps.
- Establish who's responsible for what before the next meeting.

Let's talk more about each of these...

**GIFT·OLOGY®**

## **CELEBRATE THE WINS**

This is the most important part of the meeting. It's where we celebrate the Home Runs – either new partners, new referrals, or new referral deals closed -- in front of one another.

There are meetings when not everybody has wins to report. And there are meetings when everybody is reporting wins. Those are my favorites, of course. But regardless of our current organizational momentum, we want to create a culture of noticing every good thing.

Recognize and celebrate the behaviors you want repeated. Even if the behaviors haven't gotten the results yet.

## **“WHAT IS A RELATIONAL WIN?”**

You can't measure relationship building efforts the same as traditional marketing. If you're asking 'what's the return-on-investment?' then you're missing the point.

### **Here's a better question...**

*“How do I know if my relationships are growing?”*

**Answer:** when you experience relational wins.

A relational win is a positive acknowledgment from one of your VIPs:

- A private text or email.
- A phone call or voicemail.
- A video or public social media shoutout.

*Why are relational wins important?*

**Answer:** because it means the relationship is 'warm.'

A marketer might say “relational ways prove goodwill and demonstrate a brand of affluence, class, and high-recognition.” True, yes. But painfully sterile. And lacking the heart behind it all.

Relational wins prove people are willing to go to bat on your behalf.

They are loyalty, professed out loud.

They answer the question: “who is WITH ME??”

They lead, organically, to business conversations.

From an ROR (return-on-relationship) angle, they are the first step towards new opportunities, better engagement, referrals, deal flow, access, and all the other compounded returns of relational investment.

Gifting is the #1 way to accelerate and experience these wins.

Gifting keeps strategic relationship builders top-of-memory, peak-of-heart. Even when location, time, or current focus prevents the 'normal' nurturing efforts.

Gifting creates proximity in seasons of distance and circumstances of life.

EXAMPLE of a relational win:



**[SCAN HERE]** Watch a (popular) game show host open a GIFT·OLOGY love bomb.



**[SCAN HERE]** Watch Mel Robbins deliver a relational win to her giver.

Your goal = put a stake in the ground for forever relationships.

- Figure out who you want in your corner.
- Communicate with a GIFT·OLOGY-style campaign.
- Experience relational wins, home runs, and new heights.

*It's as simple (and as difficult) as that.*

### **“WHO BROUGHT THAT PERSON IN?”**

I always want to know who's referring people to us. Our team's relationships don't operate in a silo from mine. If someone refers Carissa to a new client, I want to be the first to say, “I'm sure Carissa has already thanked you, but thank you, Jesse, for connecting her to Allan.”

If Jesse brings it up to me before I bring it up to Jesse, that's an opportunity missed.

So when a sale is announced, be it a sales meeting or a standup or any other time, after a congratulations, the next thing to ask is, ALWAYS:

*“Who brought that person in?”*

### **WHO'S EXCITING?**

- Why they're exciting right now.
- What you've done (or what you're going to do).
- Brainstorm or share

It's very common to talk about gifts here. *“What have you sent him, what are you going to send them.”* This is important because it also keeps our team striking while the iron is hot.

When Anna referred Lexi to Sara for employment in our organization, she was constantly being asked: *“Did you send Anna Cutco yet?”* Her answer was consistently ‘No.’ So, I lovingly nagged her, like any boss would do. Until one day I was like, *‘Why the heck not??’*

Her answer: *“Because she's moving to West Virginia in August and they'll be arriving a week after she moves in!”* Oh. Umm... excellent! John Not Needed.

## WHO'S GOING TO BE EXCITING?

- Why they're going to be exciting soon.
- What you've done (or what you're going to do).
- Brainstorm or share.

It's good to talk about what's happening with people, in general, not just what's happening on our behalf.

For example, we might talk about "Megan." She's about to join a key industry board next month, which puts her in direct contact with an existing relationship, and some top-level executives we've been trying to reach.

One of the relationship managers suggests we send her a personalized congratulatory gift. "And when she reaches out to thank [ACCUMULATOR], we can throw out a few insights on potential initiatives and some stuff, John, that you're seeing." Teamwork at its finest.

How did somebody on our team know that 'Megan' was invited to become a board member? Because while diving on LinkedIn, she made a two-sentence announcement, and the energizer on our team picked it up.

*Everything works together.*

## SYSTEMIC ISSUES & PROBLEMS-TO-SOLVE

Here are the types of things we talk about in this section of the meeting:

**Missing Referral Data:** A referral came in, but crucial details (like who it came from or what company they work with) are missing, delaying follow-up.

**Delayed Thank-You Gestures:** A thank-you note or gift for a referral giver hasn't been sent.

**Failure to Report Progress:** A referral conversation went well, but the giver hasn't been updated, risking the relationship.

**Tech Failure:** The CRM tags didn't get applied correctly, or duplicate records have been created (AGAIN!), causing confusion about credit or next steps.

**Inconsistent Engagement:** A referral partner needs a celebration, congratulations, or condolence and we (usually me) either didn't know or hasn't reached out yet.

**Partner Drop-Off:** A partner made mention of a potential introduction and then gone radio silent.

**Gift Delays:** Logistics around sending a personalized gift is stalling due to vendor backlogs or issues with warehousing and/or international shipping.

**Failure to Correct Poor Referrals:** A partner gave a referral that wasn't a fit, but no one has taken the time to write the email on what would be better (and how we helped the no fit).

**Under-Appreciated Referral Givers:** We haven't heard from somebody in a bit. And we're wondering why.

*Sometimes people just need a little love.*