

LEVERAGING PROFESSIONAL RELATIONSHIP

Solution Overview

ReferralCycle

ReferralCycle is a **free** solution for exchanging opportunities and referrals with an unlimited number of people from your phone or computer.

A simple explanation of how this system works comes from Facebook and Twitter. These systems are popular because you can easily share information with a mass audience and anyone can use them for free. ReferralCycle works much the same way. This system lets you easily share information with a mass audience and anyone can use it for free. But, unlike the other two systems, ReferralCycle is designed specifically for professional activities such as referrals and broadcasting opportunities.

We take this concept a step further by not waiting on your contacts to sign up. This solution allows you to include your entire network, by pulling contacts from sources like LinkedIn. Once you do, **100% of these people are immediately actionable and can work with you!** We understand that many of your friends and contacts aren't social media people and don't sign up for accounts, but they will help you if it's easy. We make that happen! Your contacts only need to get an account to do more than the basics. Once in the system - **you can share opportunities, ideas, and referrals in seconds with everyone.** ReferralCycle will then maintain an easy to use record of these activities (especially useful for paid referrals and commissions). Once you use this system, you'll find that it leverages your network in ways you never thought possible. There is no easier way to work together!

You can use it to just send ideas/opportunities to your network of friends and professional contacts. But if you're a sales professional, you can also use it to manage referrals from start to close!

A Different Approach to Sales and Networking

The premise of our viral networking solution is to reduce the time needed to accomplish tasks by leveraging your contacts effectively. We're not trying to replace systems like **LinkedIn**, but rather help you leverage those relationships effectively. ReferralCycle is not a directory; we provide action tools!

We get you started earlier in the process than solutions like Salesforce. ReferralCycle connects you and all of your business partners to exchange referrals and opportunities for FREE in the same system you use to track sales and performance- everyone having accounts that collaborate.

Unlike CRMs such as **Oncontact, Sage ACT! and AIM** - we help you get, fulfill, and close referrals/deals them in the same system. All of our solutions include one of the easiest processing/tracking systems that streamlines your efforts and reduces the time and resources needed to sell and close. Our technology and methodology is exceptional enough that it's licensed by multi-national companies.



What This Does for You: Four Examples

1. You **meet people** all the time (conferences, social events, etc.). **Once you exchange contact information, how do you leverage that relationship?** We not only help you capture their information quickly - but also allow you to immediately send them ideas, opportunities, and referrals. So, you can meet someone at a conference for the first time and become ReferralCycle partners (remember they don't have to sign up to become your partner). Then, you can immediately send them an opportunity from your phone (on the show floor) and both of you will have a record of that communication. You're now taken even more seriously as a professional contact, as you've helped them within minutes of meeting – and they will be inclined to return the favor.

2. Business **people often seek introductions** to other professionals (for sales, talent, etc.). **ReferralCycle allows you to quickly communicate with your entire network to ask if anyone has a relationship with the person you want to meet.** So, you could be traveling and realize your efforts would be more effective if you could connect with someone from a certain company. From your phone, you can send out a question to some, or all, of your network. They will get an alert email and can respond from their phones or computers immediately, helping you connect the dots of the professionals they know to arrange the needed meeting. From that point forward, you and your network partners have a record of this thread of conversation that is much easier to follow and use than scattered texts and emails.

3. If you attend a **networking club**, fellow members likely have to give each other referrals with a set frequency (weekly, monthly, etc.). The value of these referrals can be diminished, or lost, by the process. In thousands of these clubs, members have to use a limited form/process from the group's website or pen and paper. The nuance of the moment is lost when documenting hours/days later. **That ends with ReferralCycle! We provide free personal accounts that work from phone, tablet, and PC.** So, when a referral situation arises, you can take action that moment. These personal accounts can be clustered in a selective manner to automatically share reporting for the club. Plus, you can now broadcast opportunities, questions, or business ideas with your network using the same system and contact list you use for passing referrals. There is no easier way to provide/receive opportunities and referrals!

4. Sales **professionals often have referral relationships** with multiple entities (companies, networking clubs, etc.). **ReferralCycle allows you to centralize all of the entry and tracking of these referrals in one place that's accessible from your phone** or computer. So, you can send referrals to five different companies (some of which are commissionable) and then have easy centralized tracking/reporting that you can share with all, including your networking clubs, that only shows their activity. If those organizations join our service, then you can specify your relationship with them and they'll automatically receive your information - further minimizing paperwork. When your organizations join, this system allows you to connect with your network and fellow employees in the same system to close more business.

The screenshot displays the ReferralCycle dashboard for David Wesley. The dashboard includes a navigation menu on the left with sections like Partners, Deals, Messages, Organizations, Individuals, LinkedIn, and Performance. The main content area is divided into several sections:

- Start a New Referral:** A button with a green arrow icon and a tooltip: "Click here to send or start a new referral deal. All options are in this area."
- Referral Navigator:** A button with a green circular arrow icon and a tooltip: "Click here to navigate your referrals. This is the area for managing these deals."
- New Referral Partner:** A button with a person icon and a tooltip: "Click here to add a referral partner. This will allow them to send & receive referrals."
- DealInfo Summary:** A table with columns: Today, MTD, LM, YTD. Values: Today: 0, MTD: 10, LM: 15, YTD: 25. Below it are links for "All Month" and "Organization Deals".
- Organization Referral Deals (unacknowledged):** A table with columns: Deal Name, Ack, Status, Owner, Start, Amount. Total: 28.
- Organization Referral Deals (all):** A table with columns: Deal Name, Ack, Status, Owner, Start, Amount. Total: 26.
- Active Deals:** A table with columns: Deal Name, Owner, Start. Total: 4.
- YTD Conversion Effectiveness:** Three pie charts showing conversion rates. Summary: 189 Referrals, 189 Referrals, 106 Deals resulted in 39 resulted in 59 Deals Closed.
- Referrals to Deals:** 54%
- Referrals Closed:** 21%
- Deals Closed:** 39%
- Average Referral Response:** 60d:48m
- Average Deal to Close:** 60d:13h:76m

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The power of professional contacts and networking is to leverage those relationships – and that's what we do! Start exchanging opportunities with an unlimited number of people today – for FREE!