

BUILDING REVENUE THROUGH REFERRALS

KEVIN PIKET

BUSINESS DEVELOPMENT TEAM LEAD, ASCEND TECHNOLOGIES



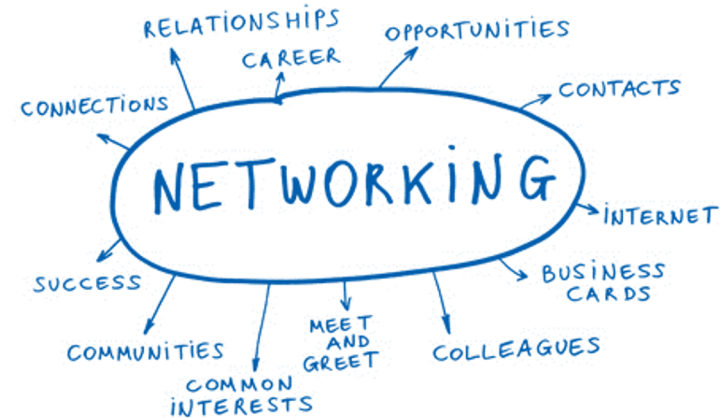


Building Revenue Through Referrals

Kevin Piket

Agenda

- ◆ Why Am I Speaking Today?
- ◆ Personal Sphere of Influence
- ◆ Go-Giver Mindset
- ◆ Where to Start?
- ◆ Example Networking Groups
- ◆ Using LinkedIn
- ◆ Good Referral Partners
- ◆ How to Connect
- ◆ Make It Easy



Why Am I Speaking Today?



Become an Intentional Individual Contributor in September 2020



Have sold **\$520k in Monthly Recurring Revenue** (mainly 36-month contracts) and **\$906k in projects** in the last 3 years. Have closed at least 3 deals a month in the last 36 months in a row.

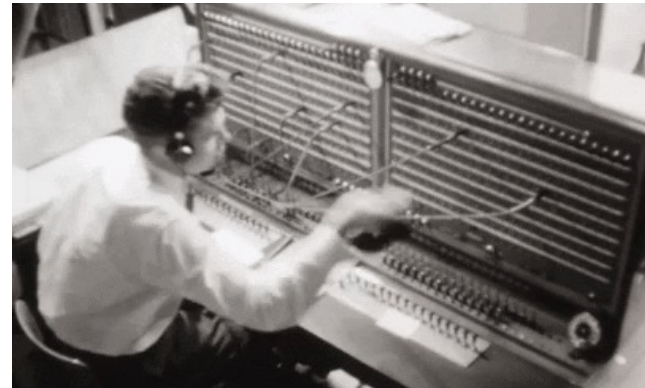


100% of my revenue generated came through my personal network and my referral partners during this time.



I have not made a cold call in the last 15+ years

Last Cold Call



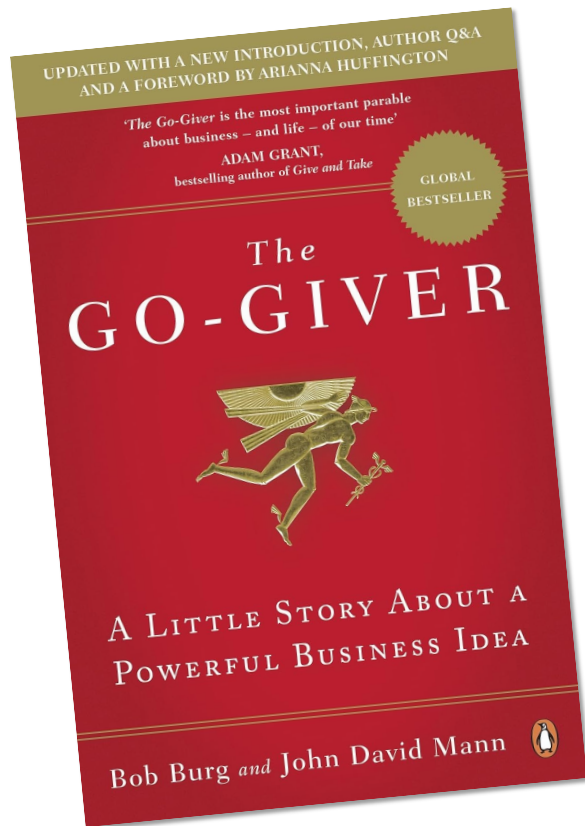
Personal Sphere of Influence



Your sphere of influence are people in your personal and professional network with whom your opinion hold some weight



Go-Giver Mindset



“
Your true worth is determined
by how much more you give in
value than you take in payment.
”

Where to Start?

- ◆ LinkedIn
 - Take time to go through your contacts (“10-15” amount per week)
- ◆ Old Business Cards/Rolodex
- ◆ Former company colleagues
- ◆ Former company partners
- ◆ High School/College friends
- ◆ Neighbors/kids events
- ◆ People that sell to the same contacts, but aren’t competitive
- ◆ Networking Groups (current and former)



Example Networking Groups



Using LinkedIn



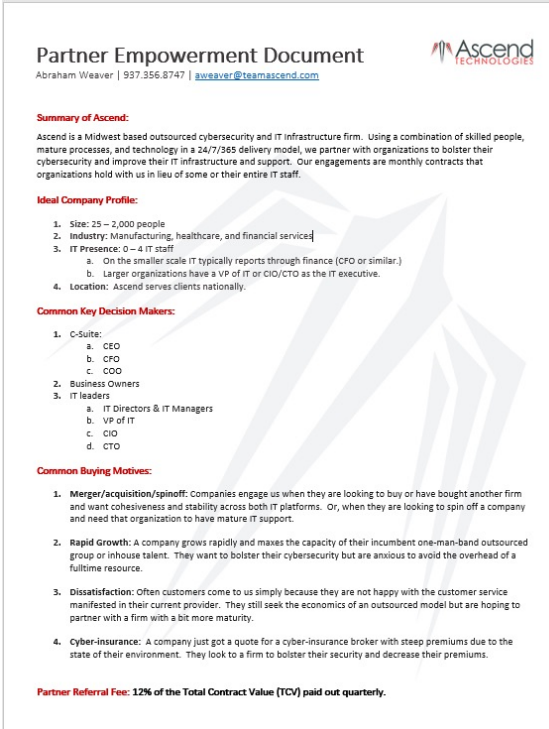
Linked 

Be Intentional + Focused

Buyer Persona

- ◆ Understand your **ICP**
- ◆ Be clear on **WHO** you want to talk to
- ◆ Be clear on **WHY** you want to talk to them
- ◆ What is in it for the person referring you?

Partner Empowerment Handout



The image shows a document titled "Partner Empowerment Document" from Ascend Technologies. The document is a handout for partners, providing information about Ascend's services and the criteria for ideal company profiles. It includes sections for Summary of Ascend, Ideal Company Profile, Common Key Decision Makers, and Common Buying Motives. The document is dated 2023 and includes contact information for Abraham Weaver.

Partner Empowerment Document
Abraham Weaver | 937.356.8747 | aweaver@teamascent.com

Summary of Ascend:
Ascend is a Midwest based outsourced cybersecurity and IT infrastructure firm. Using a combination of skilled people, mature processes, and technology in a 24/7/365 delivery model, we partner with organizations to bolster their cybersecurity and improve their IT infrastructure and support. Our engagements are monthly contracts that organizations hold with us in lieu of some or their entire IT staff.

Ideal Company Profile:

1. Size: 25 – 2,000 people
2. Industry: Manufacturing, healthcare, and financial services
3. IT Presence: 0 – 4 IT staff
 - a. On the smaller scale IT typically reports through finance (CFO or similar).
 - b. Larger organizations have a VP of IT or CIO/CTO as the IT executive.
4. Location: Ascend serves clients nationally.

Common Key Decision Makers:

1. C-Suite:
 - a. CEO
 - b. CFO
 - c. COO
2. Business Owners
3. IT leaders
 - a. IT Directors & IT Managers
 - b. VP of IT
 - c. CIO
 - d. CTO

Common Buying Motives:

1. **Merger/acquisition/spinoff:** Companies engage us when they are looking to buy or have bought another firm and want cohesiveness and stability across both IT platforms. Or, when they are looking to spin off a company and need that organization to have mature IT support.
2. **Rapid Growth:** A company grows rapidly and maxes the capacity of their incumbent one-man-band outsourced group or inhouse talent. They want to bolster their cybersecurity but are anxious to avoid the overhead of a fulltime resource.
3. **Disatisfaction:** Often customers come to us simply because they are not happy with the customer service manifested in their current provider. They still seek the economics of an outsourced model but are hoping to partner with a firm with a bit more maturity.
4. **Cyber-insurance:** A company just got a quote for a cyber-insurance broker with steep premiums due to the state of their environment. They look to a firm to bolster their security and decrease their premiums.

Partner Referral Fee: 12% of the Total Contract Value (TCV) paid out quarterly.



Searching LinkedIn

Search Contacts

A screenshot of the LinkedIn search results page. The search bar at the top contains 'John Garey'. Below the search bar, there are filters for 'People', '2nd', 'John Garey', 'Locations', 'Industry', and 'Current company'. The search results list several profiles, each with a profile picture, name, title, location, and a 'Follow' or 'Connect' button. The profiles include:

- Gregory W. Wippen: MBA at The University of Chicago Booth School of Business, Greater Chicago Area, 473 followers.
- Blesson Abraham: CEO at Cambio (YC S22) | 2x Founder/CEO with a successful exit Chicago, IL, 3K followers.
- Jean Theis: Activator | Business Integrator | Authentic Leader | People Developer | United States, 8 other mutual connections.
- Mike DiPirro: CIO, CTO, Information Security Executive, Crystal Lake, IL, 2 other mutual connections.
- Tony Baumgardt: Helping community based financial institutions increase efficiency and maximize profits! Racine, WI, 2 other mutual connections.
- Paul Kundert: President/CEO at UW Credit Union, Greater Madison Area, 3K followers.
- Steve Hannan: Chief Information and Risk Officer at Landmark Credit Union, Milwaukee, WI, 3 other mutual connections.

Find The Right Contacts

A screenshot of a LinkedIn profile for Mike DiPirro. The profile shows a profile picture, name, title 'CIO, CTO, Information Security Executive', location 'Crystal Lake, Illinois, United States', and '500+ connections'. It also lists mutual connections: Christi Colba, Andy Maser, and 2 other mutual connections. There are buttons for 'Connect', 'Save in Sales Navigator', and 'More'. The profile highlights '2 mutual groups' and an 'About' section describing his role as a Senior Portfolio, Program, Product and Engineering Development Leader.

Create The List & Then Ask

A screenshot of an email draft. The 'To' field contains 'John Garey <jhg@garey.com>'. The 'Subject' field is empty. The body of the email reads:

John,

It was great speaking with you earlier! Per our conversation, the following people below look like good contacts that would be perfect for us to speak with regarding our services. They all fit within our ICP. Please let me know if you feel these would be good introductions. I have put below the "introduction paragraph" that I have created for you to send to them. Please add whatever you feel necessary to it. I wanted to make it as easy as possible for you. Please let me know if you have any questions and THANK YOU for the help!

LinkedIn Connections

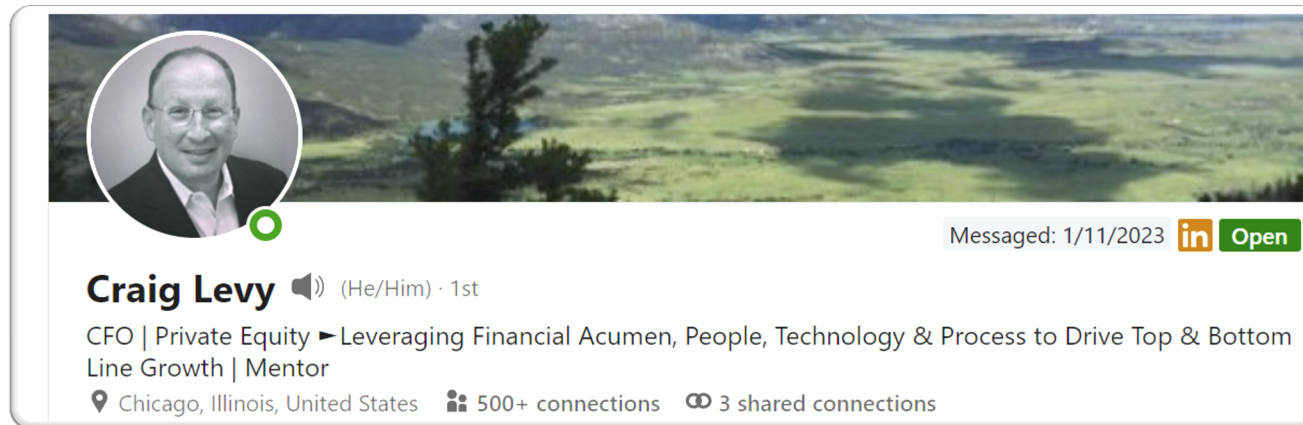
1. [Mike DiPirro](#)
2. [Steve Hannan](#)
3. [Paul D](#)
4. [Mike Lee](#)
5. [Kelly McDonough](#)
6. [Mike Doyle](#)

I would like to introduce you to someone that I trust in my network, [Kevin Platt](#). Kevin has been in a high-level technology sales capacity for over 27+ years. He's adept at building and maintaining a large active network of clients, potential clients, partners, and colleagues. He is currently a sales professional with [Ascend Technologies](#). Ascend works with businesses across the US of annual revenues between \$30 million and \$2 billion to make their IT needs more efficient. They are a technology solution provider that companies partner with for their IT infrastructure needs. Their core service offerings include Cybersecurity, Cloud & Infrastructure, Service Desk, Salesforce Integration, Data and Application management services. He was interested in speaking with you regarding learning more about your company, specifically around your challenges, issues, and goals as it pertains to your IT infrastructure needs or cybersecurity posture.

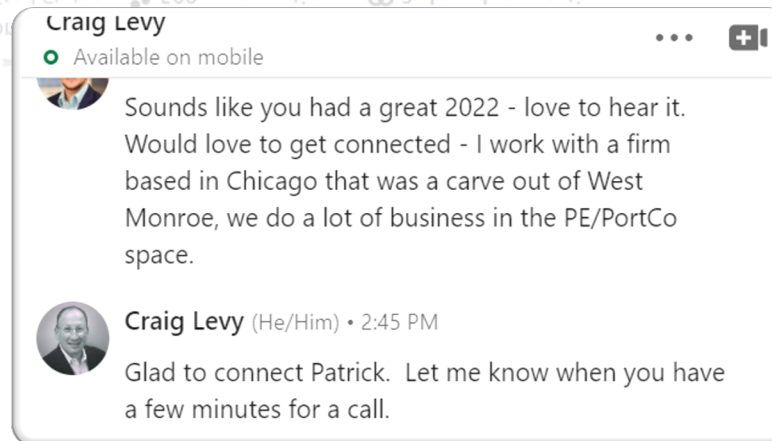
Thank you,

Kevin

Making the LinkedIn Connection



A screenshot of a LinkedIn profile card for Craig Levy. The card features a circular profile picture of a man with glasses, a green online status indicator, and a background image of a green landscape. To the right of the profile picture, it says "Messaged: 1/11/2023" with a LinkedIn icon and an "Open" button. Below the profile picture, the name "Craig Levy" is displayed with a speaker icon and "(He/Him) · 1st". The bio reads "CFO | Private Equity ► Leveraging Financial Acumen, People, Technology & Process to Drive Top & Bottom Line Growth | Mentor". At the bottom, it shows a location pin for "Chicago, Illinois, United States", "500+ connections", and "3 shared connections".



A screenshot of a LinkedIn message conversation. The top header shows "Craig Levy" with a green online status indicator and "Available on mobile". The first message is from an unnamed contact: "Sounds like you had a great 2022 - love to hear it. Would love to get connected - I work with a firm based in Chicago that was a carve out of West Monroe, we do a lot of business in the PE/PortCo space." The second message is from "Craig Levy (He/Him) · 2:45 PM": "Glad to connect Patrick. Let me know when you have a few minutes for a call."

LinkedIn Posts – After Events

Abraham Weaver • 1st
Cyber Security, Cloud, and IT Infrastructure
1w • 🌐

The Cincinnati market is a booming...so many positive things going on in the startup business community. Enjoyed attending the 1st Annual Alloy Economic Development Awards today. Seeing [Laurence Jones](#) and our friends at ...see more




👍 You and 111 others 5 comments

👍 Like 💬 Comment 🔄 Repost ➦ Send

Kevin Piket • You
Ascend Technologies - CyberSecurity, Cloud & IT Infrastructure and Service D...
5d • 🌐

Great event last night with [MBBI](#) on Fractional [#CFO](#) Programs. The panel was excellent and filled with some great knowledge from [Craig Pace](#), [Sal Burd](#), [Jay Goethal](#), [Robert Jordan](#) and moderator [John Gorzak](#). This is a great organization that provides outstanding events and excellent content! [#education](#) [#leadership](#) [#networking](#)

Laurie Falduto - Huspen Craig Levy Fred Stephenson Jordan Howard Patrick Green Abraham Weaver Julie Spiller Heidi K Cindy O'Connell Penny Foust Bob Brogan Rick Kaufmann Jason Uhlmann Tom Meyer



👍 Dana Bailey and 41 others 9 comments · 1 repost

👍 Like 💬 Comment 🔄 Repost ➦ Send

📊 2,344 Impressions 🔍 View analytics


Patrick Green • 1st
Ascend Technologies - CyberSecurity, Cloud & IT Infrastructure, Service Desk...
3mo • 🌐

Had a great time learning about trends in cyber security at the [ACG Cleveland](#) Panel Event today. Lots of great takeaways covering cyber insurance, ransomware, risk assessments, and much more. ...see more

ACG Cleveland
1,455 followers
3mo • 🌐 + Follow

This event is TOMORROW - Don't miss out!

Are you buying or selling a ticking time bomb? ...see more




ACG Cleveland Panel Event: "The Growing Risk of Cyber Threats in Today's M&A Market"
acg.org • 1 min read

👍 9

👍 Like 💬 Comment 🔄 Repost ➦ Send

Abraham Weaver • 1st
Cyber Security, Cloud, and IT Infrastructure
3mo • 🌐

Great event at [#FutureCon](#) yesterday! I always enjoy meeting good people and working with my amazing team to share how [Ascend Technologies](#) is helping IT leaders bolster their cybersecurity posture. ...see more



👍 You and 48 others 6 comments

👍 Like 💬 Comment 🔄 Repost ➦ Send

Good Referral Partners



- ◆ IT Advisory Firms and vCISO only companies
- ◆ Fractional CFOs and CPA Firms
- ◆ Banks and other Financial Institutions (i.e., PE Firms)
- ◆ Independent Consultants
 - Operations
 - Leadership
 - HR
 - Sales
 - Marketing
- ◆ Retired Business Owners (monetize their network)
- ◆ Internet/VOIP Service Providers that don't sell MSP services (think who sells to the same contacts as you, but doesn't compete with you)
- ◆ EVERYONE in this audience today can be a referral partner for YOU!

How to Connect



Set up a Teams/Zoom call with key partners weekly



Set up breakfast/lunches with potential power partners (local to your market)

- ◆ **Power Partner** – Someone who can walk you into a company and you jump ahead sale stages because of who they are
- ◆ **Be Strategic** – Come prepared with potential intros (5-7 from LinkedIn) and see how many they can intro you to



Look to give first (Go-Giver Mindset)

- ◆ Find ways to refer them contacts or potential partners first



Look for networking events to attend together

Referral Programs

- ◆ Formal Company Referral Program?
 - 12% of the Total Contract Value (TCV)
 - Paid out Quarterly
- ◆ Refer leads back and forth
 - CPA firms and banking institutions can't accept referral fees
 - Refer potential customers & partners
- ◆ Find a way to say Thank YOU!
 - Starbuck gift cards
 - Amazon gift cards
 - Sporting event tickets
 - Something of value for them



Make it Easy

Create an Intro Paragraph for them to refer you to their contacts:

Purpose – Email that you would send to people you are referring me to as a prospect. The yellow highlight section is for when I ask you to refer me someone instead of you thinking to refer me to someone in your network.



I would like to introduce you to someone that I trust in my network, [Kevin Piket](#). Kevin has been in a high-level technology sales capacity for over 27+ years. He's adept at building and maintaining a large active network of clients, potential clients, partners, and colleagues. He is currently a sales professional with [Ascend Technologies](#). Ascend works with businesses across the US of annual revenues between \$50 million and \$2 billion to make their IT needs more efficient. They are a technology solution provider that companies partner with for their IT infrastructure needs. Their core service offerings include Cybersecurity, Cloud & Infrastructure and Service Desk management services. **He was interested in speaking with you regarding learning more about your company, specifically around your challenges, issues, and goals as it pertains to your IT infrastructure needs.**





Questions?

teamascend.com

Kevin Piket

Business Development Team Lead

kpiket@teamascend.com

630.688.4732

<https://www.linkedin.com/in/kevinpiket/>



2025

SALES
SUCCESS
SUMMIT