

The Magic of Virtual Coffee Meetings

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Introduction

Networking, both **offline** via live events, meetings, and conferences and **online** via social media and video platforms, is vital for growing any business. Most of us are familiar with in-person networking and have developed skills to connect in person, form valuable relationships, and make that work as a business growth strategy.



Some have discovered great value in adapting the face-to-face networking model to effectively work online. Given the current Coronavirus COVID-19 situation, it is imperative that entrepreneurs adopt the concept of hosting virtual coffee meetings to accomplish the same or even greater results in our businesses.

We can use the Internet to meet virtually with anyone else in the world. These virtual coffee meetings can take place any time of day and you don't even have to dress up (from the waist down!) to host them.

Wondering what this whole “virtual coffee meeting” concept is all about?

Not sure how to get started?

Nervous about actually doing them?

No worries!

Inside this short guide is all the information you need to not only get started but make virtual coffee meetings a key marketing strategy for your business. You'll discover how to save time and effort with 20-minute online conversations to expand your referral network, increase your circle of influence, and open doors to new opportunities to grow your business!

Virtual Coffee Meetings Defined

A virtual coffee is simply a 20-minute online conversation that leads to opportunities to serve others and grow your business. They help you to be seen and heard more widely, which also grows your visibility and reach.

You attend a live networking event, meet someone new, and discover there is synergy between what they do and what you offer. You've made a true connection, so the next logical step is to exchange business cards and invite this person for a cup of coffee. You do this with the primary intention of learning more about one another and your respective businesses and to see if there are ways that you can support each other.

A virtual coffee is a spin-off of that concept, except that the conversations are happening virtually (via phone, Skype, Zoom, Facetime, or another online platform). This process provides the opportunity to move through the connecting process much more quickly to determine



if there is a fit for continuing the conversation or moving to the next step.

There's nothing like meeting someone face-to-face but a virtual coffee really is the next best thing for meeting new people, upleveling your circle of influence, finding great referral partners and potential clients, and creating visibility opportunities.

Key Benefits

Hosting virtual coffee meetings saves you a lot of time. Think about the time involved in meeting someone in person. When we factor in the preparation, drive time, and meeting time, it is easily over an hour, if the meeting location is close by and the conversation is focused. In-person meetings can be very scattered and in some cases, unproductive.

This process is much quicker, allowing you to assess whether the other person and his/her business is a fit without wasting a lot of time.

It provides another way to expand your network and reach to those you may never meet in person. In fact, it can provide opportunities to create a global reach. The technology exists to host virtual coffee meetings across the globe. If your product or service can be delivered virtually, this process provides increased possibilities.



What would happen in your business if you combined your in-person networking (when we can return to that) with hosting virtual coffees to connect and form ventures with your perfect referral partners? This process can help you fill your client roster and programs, learn about new opportunities, and generate new ideas for reaching your ideal clients.

Consider virtual coffees as another marketing channel, a way to get the word out about your business to the specific people you want to do business with.

5 Amazing Possible Outcomes

Closely review the 5 amazing possible outcomes from implementing this powerful business-building strategy. You may be surprised at what's possible.

Referrals: This will happen organically as you start hosting virtual coffee meetings. Your guest



could very well turn into someone who can (and will) refer potential clients and opportunities your way, once a trusted relationship is formed. We just never know how well connected our guests may be and what doors they may be able to open for us.

Joint venture opportunities: As a result of hosting these meetings, you may be invited to be a guest on a radio show or podcast or be invited to speak, serve on a panel, or guest blog on the other person's web site. Opportunities to collaborate in developing webinars and programs may also surface. You may find the perfect partner to help you with an upcoming project via these conversations.

Circle of influence expansion: In our journey to up-level both our lives and our businesses, we want (and need to) add new connections to our circle of influence. Surrounding ourselves with people who inspire and are aligned with our values and mission spurs us forward. Our circle of influence grows as we have more conversations and more people know what we do.

A request for a strategy session: Virtual coffee meetings are different from strategy sessions and sales conversations. If your virtual coffee partner expresses interest in hearing more about your programs or services because they have a need for what you offer, schedule another time for that conversation. This is **not** the purpose of the virtual coffee meeting and we want to maintain the integrity of our request for the virtual coffee (and the 20-minute time commitment).

Market Research. This outcome may not be as obvious as the other four. Virtual coffee meetings are another great way to get familiar with the pain and challenges of your ideal clients and your target market.

As the conversation unfolds organically, your virtual coffee partner may share key insights into your ideal client's pain points or desires. Since this is such valuable information, take notes!

You may discover patterns or uncover new challenges you have not yet identified, which can lead to new ideas for solving them. If there is a topic or challenge you see or you are looking to hone in on for your marketing language, this may be the perfect opportunity to glean strategic as well as practical insights. While you can certainly conduct surveys, this is a “warm” way of doing research.



The Process: 4 Vital Steps



Just as in any key system or process for your business, there is a proven process to follow. Here are the 4 vital steps, including some key do's and don'ts related to inviting your partners.

1. Choose Your Virtual Coffee Partners.

The first step is to build your list of people to invite. Consider reaching out to potential ideal clients, referral partners, joint venture partners, and influencers in your area of expertise. All of these people can be great resources for building your business.

Here are some ideas for building a list of people to invite.

- Identify prospects you have spoken to in the past year and, for a variety of reasons, they said “no” or “not right now.” Reconnect and ask for a 20-minute conversation. You never know what their priorities are right now and what opportunities may come from that conversation.
- Think back to the conferences and events you attended in the past 3-6 months. Who did you meet that falls into one of these categories? Have you followed up with them? Even if you did, is there another kind of conversation to invite them to now? You may find this is a much more efficient process for following up with people you meet locally at networking events as well.

- Assess new connection and friend requests on social media. Who has reached out to connect with you that may be a great candidate to invite to a virtual coffee meeting?
- Look through the stacks of business cards accumulated from various events and networking. Identify those you want to re-connect with and invite.
- Look inside your Facebook and LinkedIn groups that have either your ideal clients or referral partners. Connect first and if appropriate, extend the invitation to a coffee meeting.
- Your email list. Who is on your list that you have not talked with, one on one, that may be a great match for your business?

2. Create your invitation. Here are the 4 core components of the invitation.

- Reference a common ground you share, content they have created, where you met, etc.
- Be clear about the purpose of the virtual coffee meeting.
- Provide an easy way to schedule a time.
- Give them your contact information and the best way to schedule the call. Avoid back-and-forth email by using an online calendar system.



Here is a virtual coffee request example that may help you get started.

It was so great to meet you at (name of event), and yet I feel like we didn't get nearly enough time to talk! Let's set up a virtual coffee so that we can get to know one another's businesses and explore ideas of how we can support each other.

I promise we'll keep the time to just 20 minutes.

I've created a "virtual coffee" option in my online calendar app. Just pick a time that works for your busy schedule:

XXX (link to calendar)

Looking forward to getting to know more about the clients you serve, what you need right now, and brainstorming ideas for supporting each other!

Thanks again. Talk with you soon.

Name or signature line

Do's Don'ts

Extending the Invitation: Do's and Don'ts

Don'ts

1. Don't invite someone into a virtual coffee that you do not have any kind of connection or rapport with. You can create rapport by commenting on their social media content or on blog posts or signing up for their free content and commenting on it. Avoid any appearance of being a “spammer.”
2. Although you want to create a template type invitation, don't make every invitation the same. When you simply copy and paste the same invitation over and over without personalizing the invitation, it looks like you are looking for leads and nothing else. Remember a virtual coffee is first and foremost about *building relationships and adding value* to your guest in the conversation.
3. Don't forget that the difference between a virtual coffee and other “nice-to-meet-you” conversations is that these are strategic and targeted conversations. You want to invite those that can be potential clients, can connect you with potential clients, or can be awesome strategic referral partners. This is where your research prior to inviting others is very valuable.
4. Don't be inconsistent with your inviting. Inviting a few people this week and not inviting again for a few weeks will not create the results that **you** are seeking.

5. Don't send the invitation from a place of having your own hidden agenda. Others can sense the energy behind the invitation. It must be genuine and sincere.

6. Don't turn the virtual coffee into a sales conversation. Schedule a separate strategy session if this is the next logical step.

Do's

1. Customize a portion of the invitation so that it reflects that person's interests, business focus, or content. Doing this sends the message that you have taken time to research, engage, and pay attention to what they have to share.

2. Invite those that have reached success in their respective industries. Some might not accept your invitation, but you just never know who may say "yes"! Inviting people that you admire or have inspired you is a great way to pull yourself forward into the next version of yourself.

3. Approach this process with lightness. Come from the energy of truly expanding your network and not from a place of desperation for clients or money.

4. Intend to add value to your virtual coffee partners, regardless of whether meeting leads into anything. Take this time to inspire and uplift them. Be resourceful. Share tips. Direct them to a resource that can help them.

5. Stretch yourself and go outside your comfort zone. Send invitations to those who have the success you want. Remember they were once where you are now.

3. Prepare for the coffee meeting

Be sure to do your homework before the virtual coffee meeting, so you are equipped with the right information for a meaningful conversation.

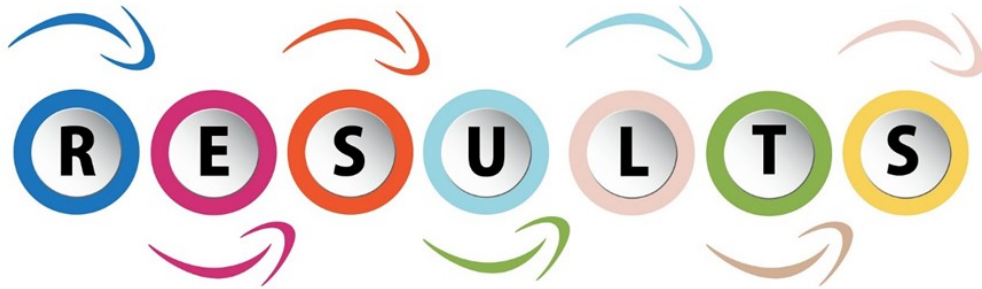
- Visit the partner's web site to learn more about them and their offerings.
Do they speak? Do they have a podcast or radio show? What kind of content do they post on their blog?
- Check them out on social media. What kinds of posts are on their page?
How extensive is their social media reach? Would you consider them an influencer? If so, are they someone you would host on a webinar or showcase to your community?
- Determine common ground. Do you serve the same market? Do you share common approaches, philosophies, and/or values? If so, there may be a good chance this could turn into a great partnership or collaboration opportunity.

4. Conduct the virtual coffee meeting.

Here is one recommended flow of the conversation. Remember the timeframe is 20 minutes! Respect the time of your guest and do not exceed that unless you mutually agree. Keep reading to understand the 8 detailed steps for conducting the meeting.

- Establish yourself as the leader of the conversation
- Invite your guest to introduce themselves
- Your turn: Share your business, your ideal client, what you are looking for right now
- Ask for referrals
- Invite into a reciprocal strategic partnership (if appropriate)
- Offer a resource and value
- Inspire them and add value
- Follow up by sending a thank you.

Key Steps for Getting the Results You Want



To get the results you want from hosting virtual coffee meetings (which could be referrals to prospects, network expansion, introductions to key decision makers and influencers, authority building, collaborations, or other business opportunities), follow the 8 steps below. Do not skip any of these steps. They comprise the secret to success!

These steps comprise a simple framework to follow, not a rigid “script”. Modify them as needed so they work for you and your business. These conversations are organic and will unfold naturally. You may well be pleasantly surprised at the results!

Step 1: Establish yourself as the leader of the conversation and establish the outcome.

Set up the conversation right at the beginning so it remains a focused, strategic business-building discussion. Do not skip this part!

Here is how this might flow:

“Hi Susie,

Thank you so much for joining me today. I'm excited to be speaking with you. Here's what I hope we can accomplish during the next 15 to 20 minutes. I'm really interested in learning more about you and your business. I would also like to know how I can support you in your journey and then I would love to share a bit about me and what I'm looking to accomplish. How does that sound?”

Step 2: Invite your guest to introduce themselves.

It might sound something like this:

"Wonderful, Susie! You go first. Share with me your business focus, who you serve, and what you need most right now".

Simple enough! Susie will share some details about her and her business and you will chime in and ask any questions you may have about her work or ideal clients. (If you've looked at her site, blog, or social media, you have comments to share!) Listen from a place of service, asking yourself, "How can I help right now?"

Step 3: It's now your turn: Share your business, your ideal client, the problem you solve for them, and who you are looking for right now. Use your elevator pitch as a foundation and be clear about who you are looking for. If it is ideal clients, describe them.

Here's a template you could use:

My business is NAME OF BUSINESS, and I serve TARGET MARKET who struggle with PAIN POINTS to achieve RESULTS. What I'm looking for in my business is MY CHALLENGE.

Here is a key example of how I and many of my clients use this step in the process.

Approach these virtual coffee meetings from the perspective of looking for referral partners (not clients). A great way to do this is to ask for feedback or insights on a new program or service you have created. By sharing the key components (ideally on a document shared virtually) with trusted colleagues and connections and asking for their insights, we not only can secure new ideas but build an even more trusting relationship. Everyone loves to help and is honored to do so.

Step 4: Ask for referrals.

The focus of the next part of the call is to ask for referrals with confidence. Many of us would love to have a great referral business, yet we don't ask or know how to ask for them. You can do this!

"Susie, who do you know that is looking for this kind of solution right now?"

Honestly, what is the worst that can happen?

Scenario 1: Susie says that no one comes to mind at the moment.

Our reply is along the lines of “No worries, Susie! Could I ask you to keep this new program in mind? As people cross your path that are looking for a solution (to the problem you or the new program solve), would you be kind enough to introduce us via Email? I will take it from there.”

Scenario 2: Susie does have someone in mind.

Our request is the same: “That’s so great, Susie! Would you be kind enough to introduce us via Email? I will take it from there.”

If Susie is new to your business, you may want to add
“You can learn more about me at (MY WEBSITE). I’d also
be happy to offer anyone you refer to me (MY FREE GIFT)
which will help them to (RESULT).”

Keep this very simple.

Scenario 3: Susie says **she** needs what you have or wants
to learn more about your product or service. Ask her to
open her calendar as you do the same and set a time for a strategy or sales conversation.
This is a different conversation from the virtual coffee meeting.

A word about referral incentives: There is no need to share or offer any kind of monetary
incentive. Be creative with identifying ways to show your appreciation for anyone they refer
that turns into a client. While you may not have a monetary, official “referral” system, some
other things you may consider as thank you’s might be a hand-written note with:

- A complimentary ticket to your next upcoming workshop or event
- A gift card to their favorite restaurant, store, or Amazon
- A small gift tied to something they mentioned in the meeting or you know they love from their social media posts



Step 5: Invite into a reciprocal strategic partnership (if appropriate).

If there is a good fit between your business and theirs, move to the topic of creating a strategic partnership. We all want to create a network of people that we can ask for support when we are launching something new or have something to promote. Of course, we want this to be a reciprocal arrangement, so we support them as well.



One way to make this ask is something to the effect of:

“Susie, I would love to create a strategic partnership with you. What that means is that I would love to be able to reach out to you when I am promoting something new. I would send you pre-written social media content that you could very easily promote. I would also be more than happy to do this for you as well during your promotional periods. What are your thoughts on that?”

In those few short sentences you are asking if she would be interested in creating this kind of give and take opportunity. Make it both easy to do and easy to say “yes” (unlike asking her to send out a solo email to her list). Again, keep it very simple. Your strategic partners can become your brand ambassadors.

Many times this conversation can lead to collaboration opportunities we may never have imaged. These could take the form of being invited to speak at their events or to be a guest presenter inside their Facebook groups, to host an online summit or workshop, or to be a guest on their podcast. I am always amazed at the doors that open as a direct result of having these virtual coffee meetings!

Step 6: Offer a resource.

If there is alignment and your lead magnet (freebie) might help them **and** serve as an example of the quality content you share, invite them to accept your gift.

“Susie, I also wanted to mention that my current free gift is, designed to (benefit). You can check that out right on my website at [www...](#)

You could also share an article or other resource that will bring value to them.

Step 7: Inspire them and add value .

This may well become your favorite part of a virtual coffee! While we host virtual coffee meetings for a variety of reasons, our number one reason is to add value and inspire our guests. We want to help them with their business and reciprocate. By truly listening to what he/she has shared, you’ll know what to say to support and help them. As you continue to host coffee meetings, you’ll discover deeper ways to help others and inspire them to continue to grow and fulfill their mission with those they serve.

Step 8: Always follow-up with an email, thanking your guest for her time and reiterating a few highlights from the conversation. Let her know she can connect with you online and encourage her to stay in touch and keep you informed about anything new in her business.



Be sure to connect with her on social media if you are not already connected. This is an easy way to expand your reach and your audience online.

Also, check back in with her from time to time. Your virtual coffee meetings should mark the beginning (not the end) of a relationship. This is another opportunity to share new developments in your own business.



A Real-World Case Study:

How I Landed 3 New VIP Author Clients from One Virtual Coffee Meeting

by Diana M. Needham

On New Year's Day 2019, I attended a social celebration event, hosted by my lovely friend, Liz. A few of the ladies who attended were new to me.

Outside at the patio table, I struck up a conversation with Debbie, one of the ladies I had not yet met. She is a leadership coach in Liz's circle of friends. It was a great discussion, as I learned more about her business and who she helps, and she asked me about my business.

As Debbie was leaving, she asked me for my business card, saying, "I have a few people I want to introduce you to." Awesome!

The following week I received an email from Debbie, introducing me to Jodie, who runs paid writing circles in my local area. We decided to connect on Zoom for a virtual coffee meeting.

In that call, I discovered that Jodie's writing students are professionals seeking critique and help in making their writing stronger and more powerful. Some of them are writing books. They are wondering what to do next with their manuscripts that have been so wonderfully reviewed and critiqued by the group.

Turning a manuscript into a book is clearly **not** an area of genius for Jodie. She asked if I would be willing to come on a Zoom meeting with her entire community and share the process for how a Word document becomes a real book that is published and launched. This training was held in late February.

That Zoom training (which Jodie includes in her library for **all** students in her writing circles) led to a call from one of the participants 2 weeks after the session. Her email included the question, “When can we get started?” She became a client immediately.

A few months later, another lovely author who was also on the training call connected to work with me. We are preparing to launch her book in a few months.

In late November, an author in another country who is in one of the writing circles asked if I would work with her to create, publish, and launch her book. A few weeks ago, she became an international best-selling author!

From that one virtual coffee meeting, I landed 3 amazing new clients who all paid in full for my highest-level author program. It generated over \$30K of income to my business last year! And that relationship continues to yield meaningful introductions to authors.

This is just one example. Can you see the possible outcomes for **you and your business**?

What to Do Next

Now that you understand not only the process but the power of hosting virtual coffee meetings to grow your business, it is action time!

Implementation is key. The first few coffee meetings will be imperfect. As with any new skill, it takes practice to feel more at ease and to become more effective in getting the results we want.



Just get started!

What do you need right now that could be fulfilled by hosting virtual coffee meetings?

- Looking for clients for a cash infusion in the next 30 days?
- Seeking great referral partners?
- Launching a new program in the next few months and want to line up strategic partners to help promote it?

Imagine what your business would look like if you invited 5 people this week to a virtual coffee meeting and followed the steps in this guide!

As one of my mentors so aptly says, “Go use this!”

And ... “Don’t you dare make it too complicated!”

Additional Tips

Batching Your invitations

Choose the source or platform that you are going to work with for that day's invitations (example: LinkedIn, Twitter, Face book, networking, past prospects, past clients.). Make your invites for that day from your chosen source. This way you are not wasting time bouncing around from one source or social media platform to another trying to decide who you are going to invite .

Batching your meetings

It will be more efficient to schedule specific times on your calendar for these meetings, rather than having them scattered on your schedule.

You might allocate time in between client calls or on the same day of the week.

If you consistently host 5 meetings a week, block specific times on your schedule to host them, with some time for a break in between.

Track your results

Track your invitations, follow-ups, and results. Assess what is working well and what is not.

As an example, you may find that your LinkedIn connections are more appropriate referral sources than targeted friends on Facebook. Double down by sending more invitations to your LinkedIn connections!



Resources to Consider

A great platform to host your virtual coffee meetings is Zoom. There is a free version and several paid options with more features. Check it out [here](#).

Find the right calendaring system to make it easier for your coffee meeting partners to find the perfect time that works for them. There are many platforms available, some with free versions as well as paid. HubSpot's list of [booking systems](#) is worth checking out.

