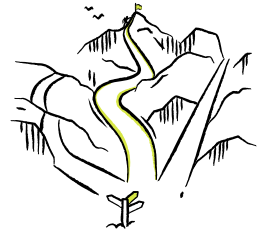


MUTUAL INTROS

Get a warm intro through a mutual.



Four steps, and the exact words to use at each one. Work it top to bottom.

1 Identify a mutual connection

Start on LinkedIn. You are looking for one person who can vouch for you, not the shortest path.

- ✓ Go to the prospect's LinkedIn profile.
- ✓ Check if you share a mutual connection.
- ✓ Choose someone you know (or once knew) who might be willing to help.

2 Message the mutual contact

Keep it short. One question, no pitch. Pick the opener that matches how well you know them.

If you haven't talked in a while

TEMPLATE

[Mutual's first name], been a minute. Hope you're doing great. Noticed you're connected to [Prospect's full name] @ [Prospect's company]. Do you know them well?

EXAMPLE

Andrew, been a minute. Noticed you're connected to Nak Patel @ Gateway X. Do you know him well?

If you're on more casual terms

TEMPLATE

Hey [Mutual's name], I noticed you're connected with [Prospect's full name]. Do you know them well?

EXAMPLE

Hey Andrew Warner, I noticed you're connected with Rachel Kersten. Do you know her well?

Or the shorter version

TEMPLATE

[Mutual's name], do you know [Prospect's full name] well?

EXAMPLE

Andrew, do you know Nak well?

3 Handle the responses

Four things can happen. Each one has a reply, including the two that are not a yes.

They say yes, and you have their email

Move the thread to email and make forwarding effortless.

TEMPLATE

Can I email you something to forward to them? Is [email address] the right email?

EXAMPLE

Can I email you something to forward to them? Is Andrew@BootstrappedGiants.com the right email?

They say yes, but you don't have their email

Ask for the channel before you write the note.

TEMPLATE

Can I give you a simple email to forward to them?

They say no

Close the loop warmly. You want the next ask to land.

TEMPLATE

All good. Thanks anyway. Anything I can help you with?

They don't respond

One follow-up. Name the ask plainly and give them an out.

TEMPLATE

Any chance you can help me with this one? If it's feasible, I would love an intro to [Prospect's full name].

4

Send the intro email

Write the note your mutual can forward without editing. Their job is to hit send.

FORWARDABLE EMAIL

Hi [Mutual's name],

Thank you for introducing me to [Prospect's name] and for being a supporter of [Your company].

I think we can [how you can help them]. Details in the blurb below.

[Prospect's first name] can reach out to me directly at [Your email].

Blurb:

[A short, clear description of your company or what you're offering]

A real one, sent by Jesse

Referring a happy customer into a prospect they already know. Note how little work it leaves for Dana: the blurb is written, the deck is attached, and the handoff goes to one named person.

GrowthAssistant for Retention.com

FROM **Jesse Pujji** jesse@gateway.xyz
TO **Dana Whitfield** dana@northboundgoods.com
DATE Tuesday, June 25 2024 at 3:24 PM CDT

Dana,

Hope all is well - Thanks so much for your support being a customer of GrowthAssistant.

The team noticed you know Adam Robinson at Retention.com.

Would you be willing to refer GrowthAssistant to them and share your positive experience? You know the story but I've included a blurb below and attached an overview deck if you forward this note on. If they are interested, you can just connect them with Brennan at brennan@growthassistant.com.

Thanks for the support!

Blurb:

HUNDREDS of marketing teams use GrowthAssistant for staffing high-quality offshore teams. Clients include Code Academy, DoorDash, HubSpot and you name it!

It's dead simple: For only \$2500-\$3500 per month per FTE, GA places full-time, college-educated, trained Global Growth Marketers who support in-house teams with rote tasks. The person we place is reporting directly to our client (e.g., on their Slack, Zoom) and works their hours. The most common roles are:

- + **GrowthAssistant:** helps support campaign management on any digital channel including reporting, QA, tracking, etc for Meta, Google, Email, and other channels
- + **DesignAssistant:** can help format/iterate images, edit raw video, etc to make scaled creative
- + **OutreachAssistant:** affiliate/influencer management (outreach, support, etc)

I've attached a deeper dive deck, too!

Appreciate you!



Lead with their experience

Dana is a customer first and a connector second. The thank-you comes before the ask.

Do the writing for them

The blurb and the deck mean Dana forwards the note as is. No drafting, no homework.

Name the landing spot

One person to connect them with, with an address. Dana never has to decide who handles it.

Need more than four steps?

The outreach template library covers every branch this guide compresses: the mutual who goes dark, the prospect who declines, the blurb requests, and the objections.

Open [Mutual meeting outreach templates](#).

