



**MICHAEL ORTIZ**

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# Referral Booster Cheat Sheet

## 11 Helpful Facts For Knowing When to Refer Our Services

<b>The pain points my ideal clients are suffering with are:</b>	No available time or bandwidth to focus on strategic goals   Difficulty in growing and scaling the business   Increasing operating costs and cashflow challenges   Difficulty finding and retaining qualified employees   Inability to delegate tasks   Lack of business processes
<b>The current circumstances my ideal prospects are likely to be going through are:</b>	Decrease in revenue   Increase in Operating costs   Staff shortage   Difficulty with order delivery and fulfillment   Increased competition   E-Commerce digitization   Remote sales and customer engagement   Pressure to adopt technology   Financing and cash flow
<b>What time periods are most likely for prospects to need me?</b>	We service our clients all year long.
<b>What geography is critical, relevant for someone to refer me?</b>	I'm located in Orange County and can meet in person throughout Southern California   I'm willing to travel if needed.   I'm available for phone calls and Zoom with no restrictions.
<b>What specific network groups are most likely to need me or refer me?</b>	Professional Associations   Entrepreneur or Small Business Groups   Business Networking Groups (both online and offline)   Industry Specific Groups   Local Community Groups
<b>My unique skills and superpowers are:</b>	Energizing and comforting others   Creating solutions to complex situations   Synthesizing complex scenarios   Breaking through the noise and capturing the essence   Simplifying complexity into simple step-by-step details   Data visualization and story-telling



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<p><b>The roles/titles of my ideal decision makers are:</b></p>	<p>Founder   Business Owner   CEO/COO/SMO   Executive Leader</p>
<p><b>The buzz words you might hear my ideal prospects use are:</b></p>	<p>Scaling up or Scaling Challenges   Cashflow or financial management   Delegation or "Letting Go of Control"   Strategic Planning or Long-Term Goals   Work-Life Balance or Time Management   Hiring and Retaining Talent   E-Commerce or Digitization   Remote Working or Virtual Teams</p>
<p><b>The reason ideal prospects would select me over others is: (My UVP is)</b></p>	<p>I have a unique ability to strategically assess a complex situation, quickly identify existing blind spots and obstacles, create effective solutions, and leverage strengths and opportunities.</p> <p>I become your dedicated partner, always putting your success first with unwavering integrity.</p>
<p><b>These are common complaints you'd hear my ideal prospects make:</b></p>	<p>"I don't have time to focus on growing my business, I'm just trying to keep my head above water."   "I can't seem to let go of control; I end up doing everything myself."   "I don't have a clear direction for my business, I'm just going through the motions."   "I can't find or keep good employees, it's hard to find the right fit."   "I'm struggling to manage my finances and cash flow."   "I can't seem to get a handle on my business processes, I don't know what's working and what's not."   "I feel like I'm falling behind in my industry, I don't know what new technologies or trends I should be adopting."   "I'm having trouble connecting with my customers in a remote environment, it's harder to generate sales and create a relationship."   "I'm finding it difficult to scale my business and keep up with customer demand."</p>
<p><b>What life or career changes are happening for my ideal prospects?</b></p>	<p>Starting a new business   Rapid business growth   Steady or sudden business decline   Transitioning to retirement or sale of business   Need to adapt to new technologies or industry trends   Remote working   Changes in personal life</p>



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## The 5D Client Project Approach™

Guaranteed Client Project Success By Leveraging Our Proven Process.

