

Mastering the Key Referral Step: 6 Ways to Be Specific With Your Referral Request

The Plus Group

February 29, 2012





**BE
SPECIFIC**
about what
you want

You should never again hear

“Let me think about it.”



My promises to you:

1. Six great ways to identify specific prospects to ask about
2. Wording you can use at your next appointment that does work



Earned:

***Good client relationships**

***Clients express value they receive**





**BE
SPECIFIC
1-3 people
not 10-30**

Get Your Referrals Warmed Up



WHY?

Most people
don't know
how to refer
you



The 6 Steps of a Fearless Referral Conversation

Step 6:

**Keep
control of the
process**



Step 6:

**“When should I get back to
you to see if he’s
interested?”**



INTERNATIONAL

**ID:
Potential
prospects**



ID: People that they like



1. Research/Pre-plan your ask:



What would I love to ask this person?

1. Pre-plan

1. Google for co-workers
2. LinkedIn contacts
3. Beneficiaries
4. Executors of their will
5. What people have they already mentioned in their life?



ID: 1-3 People that they like who sound like good prospects



2. Listen *differently*





3. Ask Different Questions: what people are in their network?



3. **FORD: Family, Occupation, Recreation, Dreams**



3. Professional Network

1. Work peers
2. Client Base
3. Social media
4. Boards
5. Associations
6. Committees
7. Places they network
8. Any public speaking
9. Past professions/employers
10. Competitors



3. Ask your COIs:

“What are you working on?”

“How do you think it would be best for me to help you with this situation?”

Also:

“Who’s your ideal client?”



3. Ask your COIs:

“If you were me and building a business in this area, who would be the important people for me to know?”



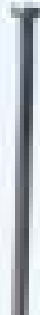
3. Personal Network

1. Friends
2. Family
3. Social media
4. Hobbies
5. Children-related activities
6. Charitable work
7. Religious, political activities
8. Others who get their business





4. Use Generic Specifics



**4.
‘Siblings’
rather than
‘family
members’**



4. 'Best mate' rather than 'friends'



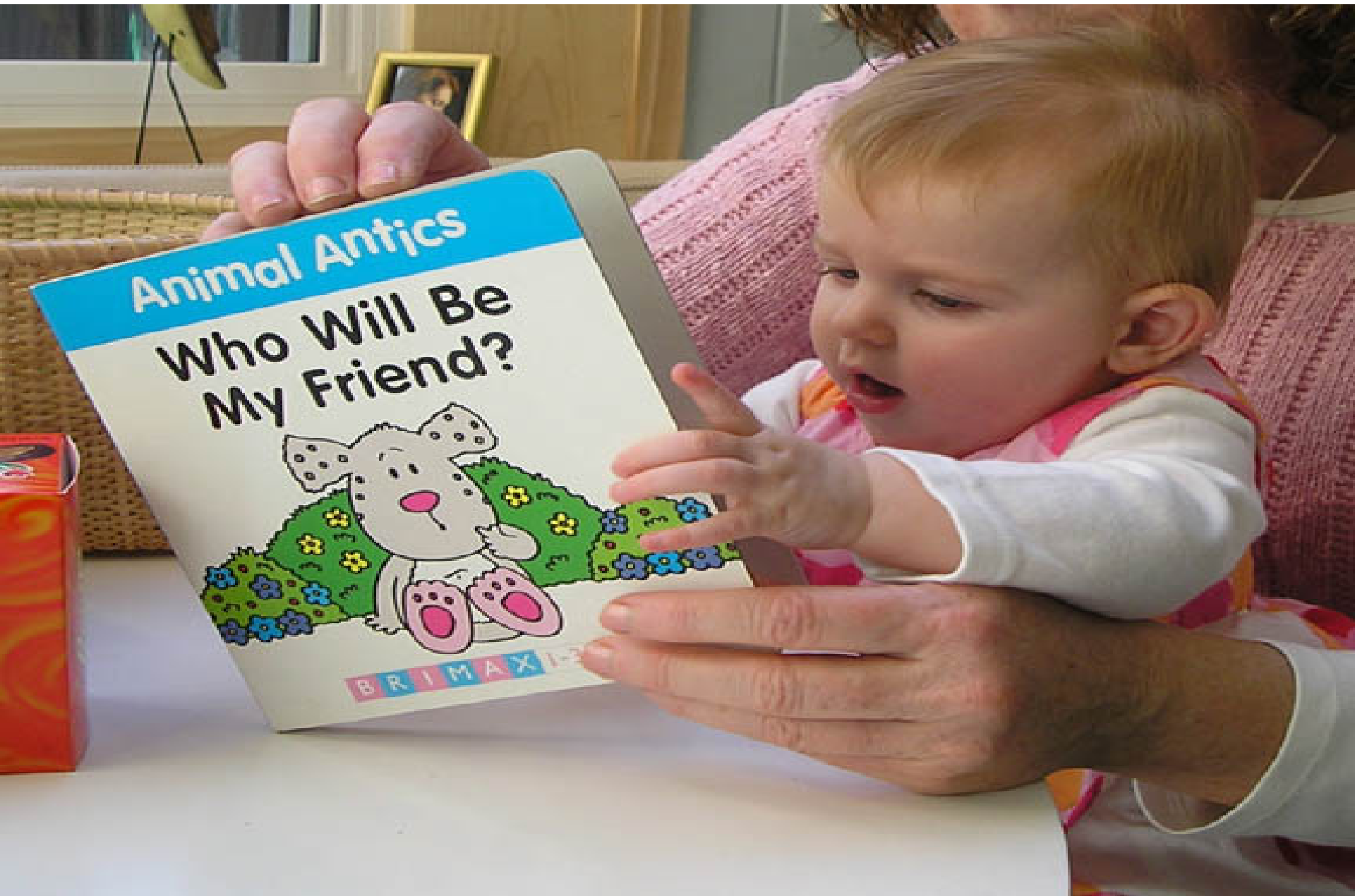
4. Favorite co-worker rather than 'co-workers'



4. Biz Owner: top referral sources; top clients; best vendors



5. Memory-jogging stories



A photograph of three business professionals in an office setting. Two men and one woman are gathered around a table, looking at documents. The man on the left is wearing a dark suit jacket and is looking towards the woman on the right. The man in the center is wearing a dark suit jacket over a light blue shirt and is looking down at the documents. The woman on the right is wearing a blue blazer and is looking towards the man in the center. The background shows a window with blinds and a desk with a telephone.

5. Weave in 2-3 stories about recent clients

6. Ideal Client/COI List



6. Put Together an Ideal Client/COI List

1. Names?
2. Companies?
3. Locations?
4. Life situations?
5. Professions?
6. Character traits?



Ask your introducers:

“Do you have any decent contacts at any of these places? I’d love to talk to them about their (fill in the blank) protection and benefits because I’ve worked with a lot of similar organizations and they’ve turned into excellent relationships.”





**How to ask:
wording you
can use at your
next appt.**

Transition:

It would be
SILLY of me
not to ask...



Direct ask:

“I’d love to meet Dave. Any chance the three of us can get together for coffee/lunch/drinks?”



INTERNATIONAL

Ask the Expert!

“What would be the best way to find out if ... (ex.) Dave might be interested?”
(ASK THEIR ADVICE!)

Jay D



Ask the Expert!

“How would YOU recommend finding out if ... (ex.) other partners in your firm might be open to hearing from me?”



My promises to you:

1. Six great ways to identify specific prospects to ask about
2. Wording you can use at your next appointment that does work



Keep Referral-Asking Top of Mind:

1. Free monthly e-zine and Quote of the Day: www.TheReferralAuthority.com
2. Free monthly referral webcast
3. Brian Tracy endorsed book: *Fearless Referrals*
4. CD: *How to Get More and Better Prospects From Almost Everyone in Your Network.*



RISK-FREE. RESULTS GUARANTEED.

***Referral Coaching Program:**

***Groups of 4-6**

***1:1 option**

**Double your
investment
Or your money
back!**

**“In the past five months, I’ve generated over 40 new referrals,
opened 10 new clients and have in excess of 100 million dollars
in my newly built pipeline”**

Steve Lewis, Bernstein Global Wealth Management



Group Referral Program

Features:

Phase One: Competence (4 months)

1. 4 monthly group calls (45-60 mins)
2. Five 1:1 calls of 15-30 minutes in between

Phase Two: Mastery/Second nature (6 months)

1. 4 best practice group calls – 30 mins
2. Six 1:1 calls of 30 minutes
3. Unlimited email contact (wording)
4. Other calls welcome



Benefits to You:

1. You master the skill of getting referrals
2. You get more business: Referrals from happy clients and introducers
3. You learn how to best leverage the strongest contacts in your network
4. Accountability and support
5. You become more opportunistic
6. Focus = growth c/o stays top of mind
7. You have greater confidence and assertiveness

***QUESTION FOR YOU:
Which strategy are you
going to use first?***



Thank You!

Matt Anderson

Matt@TheReferralAuthority.com

001 (312) 622-3121

*Referral Systems and Wording That Works –
Even for the Sales Reluctant*



INTERNATIONAL