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Automated Referral Intelligence

# The “Top 10” Guide to **Talking Referrals With Your Clients**

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## The “Top 10” Guide to **Talking Referrals With Your Clients**

Building a referral-based business is not easy - or everyone would do it. One of the top questions we get as referral experts is: “How do I talk to my clients about referrals”? If that has ever been on your mind, then this guide is for you. There are many styles and systems that may work for you. However, there are some universal principles that are foundational to all. Use this top 10 list as a self-assessment tool - then choose 1-2 to work on each quarter. Of course, please let us know how we can help, including making it all easier through automation.



# #10

## Start by making sure you and your business are “referable”

Becoming referable takes effort and doing things differently than competitors. The “magic” formula is Contact x Value x Values.

- Have a system that consistently contacts clients (at least monthly) and nurtures relationships. Use multiple communication methods - email is the #1 preferred method by consumers, but mix in other communication platforms such as text, phone, social media, and face-to-face based on client preferences.
- Deliver value added content (newsletters, blogs, relevant articles, white papers) and key messages in ways your clients prefer to consume it! Some will want video based content, some will prefer written content, and others may prefer podcast/audio format. Some, like me, like to experience a mix of media and formats. Keep it all brief and highly relevant to your audience and mix it up until you find what's right for them (surveys can help you here).
- Put your values out there through your actions and behavior. Take the lead from Dan Sullivan – author of “How the Best Get Better” and practice the 4 key values to becoming referable:
  - Show up on time
  - Do what you say
  - Finish what you start
  - Say please and thank you

# #9

## Your clients want to refer you – ask them

Would it surprise you to know that 83% of consumers would refer you yet only 29% actually do because they are not asked (Texas Tech Study)? It may be counterintuitive based on your conditioning, experience and what you may have heard from others. For many of you, this may require a change in your mindset. If you and your business become referable, why wouldn't your client want to introduce you to others?

- Introductions from a trusted source are the #1 way consumers want to learn about a product or service.
- Humans generally want to help other humans – why deprive them of the chance to work with you?
- There is a reason why referrals convert 4X the rate of any other lead source (Nielsen). It works because it is organic. It provides for everyone getting what they want. Your clients get to help others, their introductions save time and avoid mistakes associated with blind searches, and you get to replicate your best clients at much lower cost and effort – freeing up your time to better serve your clients!

The bad news: less than 12% have a system that results in consistently asking clients for referrals in ways they prefer. Don't let that be you!

# #8

## Have something to say when you ask

Scripts, outlines, key messages, sales tracks, principles; I've seen and probably trained them all! After 35+ years doing this, here's my big conclusion: it is all about what works for you - that you will actually do consistently! Knowing what to say in person and/or through online communications is probably the #1 hang-up and request for help I hear. Here's a starting point.

No matter what you say – try this basic 5 step outline:

1. Confirm value: “How has this helped you? What did you find most useful about \_\_\_\_\_?”
2. Share your referral process: “ Most of my clients come to me through introductions from clients like you. I have a simple process that makes it easy for everyone.” Describe it or get one if you don't have one.
3. Share the “why”: “This provides you an opportunity to help people you care about and gives them a chance to meet a potential provider of \_\_\_\_\_ the #1 way they want to – through an introduction.”
4. Share your targeted “ideal client”: “The type of people I enjoy working with and can help the most are \_\_\_\_\_”
5. Ask by prompting categories - especially those you know your client has active relationships with your targeted prospects: “You mentioned that you enjoy playing golf -who do you know that you play golf with that I can help? You mentioned you are active with \_\_\_\_\_ organization, who do you know there who is most like the type of people I can help the most?”

The key is to have something to say that is authentic to you, your style and your branding and then practice, practice, practice until it is second nature and sounds natural and organic.

Watch your body language if you are asking in person – your anxiety will translate to the awkwardness that no one wants. Overcome that through preparation and practice and believing in what you say.

No matter what you say - make sure you have a process that can be replicated by you and potentially others. This can include email templates if using email, outlines/scripts if in person, prompts like signature lines and referral cards, or use a software system that does all of that for you.

# #7

## Be personal, authentic and compelling

Why is it that young children and animals sometimes have the best intuition about whether someone is authentic or not? They rely on instincts and the purity of what they see, hear in words, delivery and body language and quickly form conclusions. As adults, we are more transparent than we think. Our communication choices reflect our intent, what we are thinking, what we want and who we are. The problem, of course, is that with the bombardment of information hitting us today along with record low attention spans – we tend to communicate in “unconscious sound bites” rather than conscious choices. So being authentic is about getting clear on what you communicate and how you communicate it so you stay aligned to your values, beliefs, vision and style – so keep it real!

- Doing that takes preparation. Start with clarifying your most authentic self. What are your top values? What are your beliefs? What do you want based on that? What is the vision of your life and business? What does a movie look like if you were the actor in a movie of “the best version of you” (I know – this is a trendy statement – but gets at it!).
- Get clear on your preferred communication style with your clients. Informal vs. Formal? What about greetings and salutations? Stoic vs. expressive style?
- Based on above, modify any email templates, scripts, and key messages to align with that.

# #6

## Focus on “what’s in it” for them – not you

One of the key mistakes made with asking clients for referrals is to discuss how the business benefits, rather than how the client benefits by referring. We all listen to the same radio station – WIIFM (what’s in it for me!). Focus on how your clients win by referring and watch your results improve.

- Get at the core values of clients when asking for referrals – especially helping others and making a difference. Most of your clients have been referred to other products/services and benefited from it and likely have referred others in past.
- Incentives can play a very useful role – Amazon gift cards and other reward programs can significantly increase client motivation to refer and make it top of mind. For example, I personally have referred a number of people to my neck doctor because I want to help people I care about get out of pain, and I get a free month off for each referral that becomes a client.
- Another example, at ReferMe IQ™, we offer a free month off for every referral that becomes a client. It works.

# #5

## Help clients **identify your** **“ideal clients”**

I referenced this earlier. Another mistake I see often is when people ask the general question; “who do you know that.....?” When we ask that, most clients go blank because our minds see a universe of everyone they know - it is overwhelming. We need to focus clients on a much more limited, but highly qualified group of relationships that have high likelihood of converting to your “ideal clients”.

- If you accept the reality that 83% of your clients want to refer, then we need to help them do that quickly, with the least amount of effort and awkwardness.
- The best way to do this is to ask better questions in person and/or online communications.
- Here are some communication choices to consider:
  - “I don’t have capacity to work with everyone you know. So let’s take a few minutes to brainstorm together the ones who you would most like to help, that I can help the most. For me, they generally are.....”
  - “Based on our work together, I know you value making a difference in the lives of others based on your work with \_\_\_\_\_ organization. Who at that organization do you think would be someone I can help the most, who you would like to help?”
  - “I know how committed you are to your career and making the biggest impact on your company and colleagues. Who should I speak to at your company who would be most interested and open to learn more about \_\_\_\_\_?”

# #4

## Make it easy for your clients to **introduce you properly**

Wow. I have seen it all here. Talk about awkward! The usual approach is saying something like this: “Thanks for the referral to \_\_\_\_\_. Do you think you may bump into \_\_\_\_\_ over the next week or so? Can you just mention I will be contacting him and say nice things about me?” or: “Can I send you an email template that you can use to send to them that will introduce me?” Rarely does either actually happen. The key: we must make it extremely easy for someone to introduce us properly - or they simply won't do it.

- Share 3 key messages with your clients that you want them to say about you. I have seen notecards work well here if you prefer a manual process. You can also create more effective business cards that double as referral cards with key messages on the back.
- Let your client know that you will send an email or text reminder to them in a couple of days to talk with their referral prior to calling – then do it.
- Find a way to automate all of that so an email goes automatically from your client to their referral - properly introducing you.

# #3

## Find a way to **get the referral interested** – before the call

Some of you may get frustrated because you don't see adequate conversion from referrals. Often, this is because when you contact them, they are learning about you for the first time. In some situations, the call resembles a cold call; who likes doing that? (I know some of you warriors out there will say you do!) You need to and can change that.

- Make sure the referral has visited your website and/or any other relevant resources prior to your call. You can accomplish this by asking your client to share your referral card or sending an introductory email prior to your call with easy links.
- Find out how the referral prefers to be contacted. Millennials often want to be contacted by text, email or even social media. Phone is low on their list – most don't even use voice mail! Boomers may prefer email or a call.
- Short quizzes taken in advance of the call can be a very powerful tool to educate, and create urgency to meet with you. 3-6 compelling questions that can help surface “pain points” and demonstrate your competency to solve them can create the appropriate amount of “cognitive dissonance” that may compel the referral to want to meet with you – especially when combined with the transference of trust from your client!

# #2

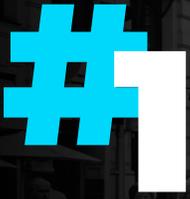
## Create a path for the referral to request contact – from you

What if you could change the game so instead of you chasing referrals to meet with you, they actually requested contact from you – in ways they prefer (email, phone, text, etc.)? That only occurs if and when you are able to implement 5 key behaviors:

1. Consistently ask clients for referrals in ways they prefer
2. Motivate clients to refer
3. Get your clients to introduce you properly
4. Get the referral interested in you and your services prior to contact
5. Create an easy and actionable path for them to request contact from you – at the moment of maximum cognitive dissonance

■ We have discussed 1-4 so far. The only way to achieve #5 is to have a system that makes that happen. You can do that by:

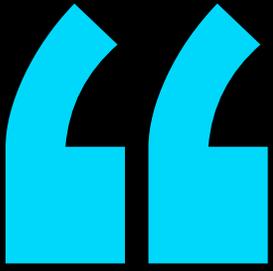
- Creating manual tools and hoping your clients share and referrals use.
- Try to configure all of that into your current CRM/email system – most get overwhelmed and don't get out of the starting gate here.
- Find a fully automated solution that does all of it for you.



# Implement a “human nature” bypass

Face it. Most of you have very positive intentions to perform the 5 key behaviors and fully understand the power of referral marketing. However, because of human nature, we often fail in the execution. Fear, anxiety, conditioning, habits, and self-limiting beliefs are all part of the human experience. Overcoming those to get ourselves to take action once is hard enough. Building successful habits that lead to consistency is even harder.

- Creating new habits can be achieved – with commitment, time and a system.
- More often than not, we need help. Coaches, tools, and technology can all be instrumental - especially in combination.
- Focus your time and energy on your gifts - your business deliverable. Wherever you can, delegate and/or automate other critical tasks that you don't enjoy or you are not good at.
- Referral automation is here. It doesn't need to be as hard as it feels.



ReferMe IQ™ is passionate about helping organizations build high growth, referral based businesses with their state of the art automated referral platform. Peter S. Velardi is an accomplished former senior executive turned entrepreneur who has trained thousands of individuals and organizations on how to build a referral based business.

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