

# Mastering Referral Messaging

To be successful at Referral Marketing, you need to master your referral mindset and elevate your referral messaging. Use this worksheet to design your messaging, practice and hold more confident conversations around referrals.

## STEP 1: CRAFT YOUR REFERRAL MESSAGING

### 1. Which conversation would you like to be more confident having? (Select one)

#### COI REFERRAL MESSAGING EXAMPLES:

- Send me your clients Dammit! (a.k.a. What would make you feel confident enough to refer clients to our firm?)
- I'd like to spend / pay for an hour of your/COI's time to ask her a few questions about how she works with clients
- How do you identify when your clients have a need for (retirement, planning, investment advice, etc.) and how do you address those needs?
- I want to serve your clients so well that you wouldn't hesitate to refer to us.
- I'm building a wealth management team for my clients to...

#### CLIENT REFERRAL MESSAGING EXAMPLES:

- When you have a friend or family member who needs...we want to be the first phone call.
- We're not the right fit for everyone. We do our best work with clients like you...describe ideal client
- Who do you know that is (approaching retirement, divorce, etc.)?
- We are actively growing our business with the goal of...
- I love what I do and am always looking to help more people...
- I want you to feel so good about the work we do that when someone needs our help, you'll connect us.

### 2. Draft your script for the conversation you chose in #1 above.

### 3. What are you most afraid of hearing in response to #2?

### 4. How will you respond? Write down your response to #3.

## STEP 2: GET COMFORTABLE WITH YOUR MESSAGE

- Select a partner to help you practice the above conversation. Your partner should act as if they are the client or COI
- Initiate the conversation using your script from above (#2)
- Have your partner respond with what you're most afraid of hearing (#3 above) in a way that makes you uncomfortable but is natural
- Reply with your response using your script from above (#4)
- Get feedback from your partner on how to improve
- Repeat this process, until you're 100% confident and comfortable with your message, like you are when saying your name.

