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Referrals 101

WORKBOOK



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Finding Your Top 10

WORKSHEET 1

The first step to finding more clients is knowing who your ideal clients are. The easiest way to do this is to think of the current clients you help who you wish you could replicate.

Action Steps:

Write down the 10 names of the clients you wish you could have more of. Brainstorm who are those people you love meeting with, who listen to and follow your advice, who understand your value and are happy to pay you.

Before you write down their names, answer these questions?

1. Are they profitable to your business?
2. Do they have problems you're interested in solving?
3. Do you enjoy working with them?

If you answered yes to those questions then write their name on the list below.

What If I Can't Think Of 10 Clients?

If you can't think of 10 current client names you'd like to replicate, think about the people you know who are not clients, but you wished they were. Or think of influential people who may never be clients but they know and spend time with your ideal prospective clients? Write down their names with an asterisk next to them.

Write Down Your 10

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.



The Invite

WORKSHEET 2

Look at your list.

Choose the people who you know that if you invite them to coffee, they will say yes.

Why Coffee? Because it's a common ground and it's informal. There's no social expectation to how long the meeting should last. It can last as long or as short as you want.

The Script:

Call them and exchange your usual pleasantries and say;

"I need your help. We're exploring some changes here at the firm and I'd like to get your advice about them. Would you mind if we met for coffee?"

or

"We're exploring some changes here at the firm and I'd like to get your opinion about them. Can I buy you coffee?"

or

"We're exploring some changes here at the firm, mainly about marketing and communication, and I'd like to get your advice/opinion about them. Would you mind if we met for coffee?"

Something additional to add at the end.

Your input would be really valuable."

Remember to only call the people you know will say yes. Try to make it as easy as possible for them. Go to the most convenient place for them.

Next Step:

Choose the verbiage that sounds the most like you and practice saying it.

Use your phone to record yourself saying to see how you look and sound.

Side note- if you haven't watched yourself on camera much, it may be a little uncomfortable. But this is crucial to making yourself better



The Meeting

WORKSHEET 3

So your client shows up to meet you for coffee. Now we have to create a great interaction with them to help facilitate a conversation that results in more ideas and referrals for you.

What to say:

Exchange your usual pleasantries and say;

OPTION 1: CLIENTS

"Rick, I've really enjoyed working with you and the family. In fact, I'd really love more clients who were just like you. If you were me, how would you go about that?"

OPTION 2: CLIENTS

"I would love to ask your advice. I've really enjoyed working with you as a client. I'd love to work with more clients just like you. If you were me, how would you find more people like you?"

OPTION 3: PROSPECTIVE CLIENTS

"Julie, I've really enjoyed getting to know you. We've had a wonderful couple of meetings together. In fact, I would love to work with more people just like you. If you were me, how would you go about that?"

The Three Responses You'll Get From Clients, And How To Reply To Them

RESPONSE 1: NO IDEAS

If they can't think of anything, here are 3 ways to respond

1. PLANT THE SEED:

- a. "Here are some things I've heard... (e.g., monthly breakfast meetings, golf, workshops, evening seminars, etc.) Do you think that's a good idea?"
- b. Don't say, "Would you invite people to _____." Instead ask, "Would you have come to something like this before we knew each other?"
- c. "I've been thinking about doing something like this, would that be interested to you?"

2. COACH THEM:

- a. "I know it's a hard question. You'd be surprised how much time people in the financial services industry spend making cold calls. I'm curious, would you ever respond to one of those? I'm just thinking there's gotta be a better way".



3. MOVE ON

a. Thanks for taking the time to chat today. It's always great seeing you. If you do come up with ideas, don't hesitate to let me know.

Regardless of the outcome, your clients now know three things:

1. You like working with them.
2. You appreciate their advice.
3. They know you are accepting new clients.

If that's all you communicate with your client, that's still a big win.

RESPONSE #2: THE SUGGESTIONS

Client: "What if you did an event/activity?"

Ask more questions: "How often? How would you invite people to that?" Gently ask for more details.

"This is a great idea. I may try this. If I do, would you mind touching base again to discuss?"

Not all suggestions will be good ones, but show your appreciation for the ideas and feedback.

RESPONSE #3: THE GOLDEN OUTCOME. "I HAVE SOMEONE FOR YOU"

Client: "That's really interesting. I was just talking with Jim and he was complaining he didn't like his advisor. I'll give him your name and number"

Remember, you don't just want a name and you don't want to leave it up to the potential client to call you. Our goal will be to turn it from a cold contact into a warm one by doing this.

"You don't know how much that means to me that you would refer me to a friend. Thank you. I'd be happy to email her, but out of curiosity, do you think that's the best way to get introduced? What if the 3 of us met for coffee?"



The Client Meeting Evaluation

WORKSHEET 4

(Print for each client conversation.)

Once the meeting is over, reflect on the meeting and fill out the answers below. The follow up after the meeting is a key component to solidify and remind yourself of the ideas that your client had.

Client name:

Date of meeting:

How would you rate the meeting on a scale of 1-10. 10= best

1 2 3 4 5 6 7 8 9 10

What was the outcome of the meeting?

What can you improve for the next time you do this?

What response did you get? Circle one.

1 2 3

What are you going to do next to move things forward?