

### **Introduction**

*Welcome* to your new Referral Prospecting Process! If you *haven't* done this before, you are about to find one of the easiest and simplest ways to attract new Ideal Clients. If you *have* done some referral prospecting, I hope you find that this outline makes it easier for you to do it all the time, and more effectively. - *Kevin*

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### **Why do this? And why most professionals don't....**

When was the last time someone asked you for a referral? And got some good ones?

Your answer probably shows that this is something that doesn't get done much, and when it is done, it isn't done very well. By creating an easy-to-use and simple system, you will be among the very small percentage of business owners and entrepreneurs that enjoy the success that comes with a solid Referral Prospecting System.

### **Step 1.**

-Make a list of your “best” clients – the ones you'd like more of. (It helps if you've already done the “Ideal Client” Process from the Energize Your Business website: [www.earthandlight.com](http://www.earthandlight.com))

-Make a sophisticated guess as to the average annual value of a client like this, either revenue or profit.

### **Step 2.**

Develop **8** sentences by filling in and editing below. I'll give some more direction in the next section:

1. This is (your name) from (your business name)
2. Thank you for your business. We really value you as a client.
3. Here at (your business name) we are committed to helping our clients/ giving our clients (your impact)
4. Is there anything you need from us or anything that we can do for you?
5. Referrals are the #1 way we get new clients.
6. Can you think of anyone from your (affiliation) or Can you think of anyone (in a situation) that you think would like to hear about (your company name)?
7. (Wait for a Referral, if none, try again) How about someone from (affiliation) or (in a situation)
8. (If no referral) Well, thanks for thinking about it. I'll send you a little reminder and try you again in another couple weeks! (if you get a referral) Thanks for the referral. I'll be in touch with them and let you know what happens. Can I use your name when I contact them?



### **Step 3.**

Practice what you wrote in Step 2 with a recorder. Make sure that the words flow and sound conversational and not scripted. It is possible to do even though it is a script! If the words don't work for you, edit them and record again until it sounds just like you talking to somebody.

### **Step 4.**

Start making calls. Give yourself a goal to call at least 5 people to start to build a little momentum and practice your language. It will only take a couple of minutes, and the practice and the process could be life-changing. Call someone from your list. Use your 8 sentences and try to stick with them and not go off-script. You want to use these words so you can see if they are comfortable to use. If not, tweak them until they are easy and automatic. And remember as you dial that each new client is worth \$\_\_\_\_\_ as you defined in Step 1.

**\*\*Even if you get voicemail, leave a message using your 8 line script.\*\***

### **Step 5.**

Debrief yourself after this call. Did you get a referral? Did you stay on script? How comfortable was it to use the script? If you want to, edit your script to make it even better. Go Back to Step 2 and 3 and then make another call. Debrief after each call.

### **Step 6.**

After you've made your calls and taken notes, you'll probably have an even better script, and you'll have some follow up to do and some follow up to schedule. Do the follow up, send the card, schedule the next call or email, whatever you said you'd do, do it.

### **Step 7.**

Contact the Referral.

### **Step 8.**

Complete the loop with the referrer. Thank them and let them know that you did contact the referral. This is important because it shows that you value both the referee and the referrer.



## Referral Prospecting from Your Client List



### **Pieces and Parts of a Referral System**

You don't have to have all of these ready and prepared before you make calls. All you need is the 8 sentences and you don't really even need those – just ASK FOR REFERRALS and you'll get some.

- Call Script – the 8 Sentences
- Follow Up NoteCards to remind the Client that you are looking for referrals
- Follow Up Email language to remind the Client that you are looking for referrals
- New Prospect Form to record the information about the referral



## Referral Prospecting from Your Client List



Here are some fresh fill in the blanks for you to use:

1. This is \_\_\_\_\_ from \_\_\_\_\_
2. I wanted to say Thank You for your business. We really value you as a client.
3. Here at \_\_\_\_\_ we are committed to \_\_\_\_\_
4. Is there anything you need from us or anything that we can do for you?
5. You know, Referrals are the #1 way we get new clients here and we'd like more clients like you!
6. Can you think of anyone from \_\_\_\_\_ that you think would like to work with us?
7. How about someone \_\_\_\_\_
8. (If no referral) Well, thanks for thinking about it. I'll send you a little reminder email and try you again in another couple weeks! (if you get a referral) Thanks for the referral. I'll be in touch with them and let you know what happens. Can I use your name when I contact them? Thank you!

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### Notes:

**Sentence 3.** Work on a short way of saying what you are committed to. This is the best expression of the impact that you want your clients to get from working with you. There is an exercise to help with this at:

<http://www.earthandlight.com/your-business-and-its-impact/>

**Sentence 4.** Think of this as a Green Light question. You don't want to ask for a referral if there is something that the clients wants or needs from you. If there is something they want, provide it. And then after that is done, call them back with this script. If there is nothing that they need or want, then you have the Green Light to go ahead with the rest of the call.

**Sentence 6.** Affiliations vs. Situations - **Affiliation.** Before you call each client, try to recall what they do, what their kids do, what they belong to etc. If you can ask for a referral from a “small” population of a group, it is easier for them. If you ask them for any referral, they have to think of everyone in the world. But if you ask for someone from their bowling team, or another Dad from the kids' Lacrosse team, it makes it easier for them to provide a referral. **Situation.** Or you can ask about someone that is in a certain situation that makes them likely to be a good referral. If you are a CPA, you may want to ask about people in certain financial situations, like getting their kids off to college, or dealing with older parents moving in etc. What situations would people be in that makes them good prospective client for you?

*GOOD LUCK AND HAPPY REFERRALS!*

