Proactive Referral System

FLAIR
business growth consultancy

Introduction

We like referrals for several reasons. For a start, they are 30% more likely to convert into clients than any other kind of lead. They also convert in less time too. Added to that, referrals come with "Inherited Credibility" where the prospect believes you're good at what you do because somebody they trust made the introduction. This just makes the whole conversion process so much easier.

In fact, many of us rely on referrals to win new clients and whilst this is undoubtedly a very efficient way of doing so it does have a few downsides too.

The first is that we really don't have any control over referrals: we can't control the amount; the frequency or the type of referrals we receive. The only control we have is to follow up an introduction or not, which isn't what I call being in control of how your business grows.

The second is reciprocity. Many people make introductions on the understanding that they'll get them in return, which is fair enough. But we only have so many leads we can give in return which means that our referral system is not scalable.

Lastly, in many cases if the economy slows down so do the number of referrals you receive. I guess this is obvious really, but it means that you become powerless to grow your business – not good, if you ask me. Ask anybody who worked through the recession of 2008/9/10.

We believe that referrals should amount to about 60% to 70% of your new prospects with the remainder coming from sources you can control. Having said that I also think you should work as hard as you can to win the maximum number of referrals you can.

That's what the Proactive Referral System is all about. We're going to give you 10 tactics you can use to increase the number of referrals you receive plus an over-riding strategy that will boost it still further.

Let's start by exploring why people give referrals in the first place.

Why Do People Make Referrals?

Ignoring the obvious reciprocity point made in the previous section people make introductions for a host of reasons and it's important for us to understand what these are if we're going to set about increasing the number of referrals we receive.

The following list comes from some research we did in 2012 and contains some of the more prominent reasons:

- **Exceeded expectations:** doing a good job will help you avoid getting a poor score on the online comparison sites, but it probably won't increase your chances of a referral. To do that you must exceed expectations: to delight your clients. A survey by McKinsey found that 50% to 80% of referrals happened when the client's expectations had been exceeded.
- **It's in their nature:** Some people are just born introducers. They like helping others and feel a good deal of satisfaction when they introduce two people who can then create a mutually beneficial working relationship. If you find these people, they're well worth looking after!
- **Because they were asked to:** I know that this is obvious, but many people don't realise that you would like them to introduce you to other prospects. Even if they do know they probably aren't sure what kind of people you're looking for. Make this obvious and your referrals will increase. This is a great use of your Headline ICP!
- **Working with you makes them feel good:** This is very powerful. If people are made to feel valued and important by being treated with respect and having their expectations surpassed, then they're much more likely to refer new leads your way if they can. To do this you need to keep your promises; never condescend or patronise; be positive and helpful and, if at all possible, make any encounters with you fun! More on this later.
- **They get a reward:** more common in a B2C world where you are dealing with Joe Public but even in a B2B environment you can reward people who send you a referral. You need to ensure you are staying within the bounds set in the Bribery Act but for some people rewards show appreciation and respect. Plus, we all like free stuff, right?
- **Reciprocity:** many people don't like to owe anybody anything so if you've gone above and beyond the call of duty for them, they feel obliged to even things up by passing on

a lead. This isn't as powerful as it once was: we're all a bit too used to having free stuff thrown at us on the internet. We sort of expect it now and don't feel obliged to reciprocate.

To summarise then: you'll get more referrals if you do a good job; treat people well; go above and beyond the call of duty; make your encounters enjoyable and tell people what kind of introductions you're looking for.

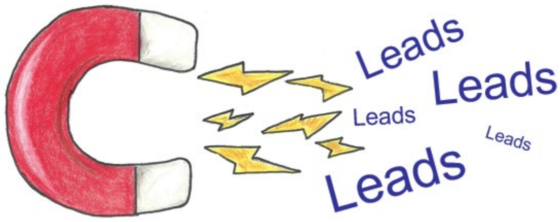
Things to bear in mind

Before we look at our 10 tactics and referrals strategy, I want to make a few key points.

1. **Strengthen your LinkedIn Profile:** more people are likely to visit your LinkedIn profile page if you're being more proactive about getting referrals so make sure that it looks appealing to any potential clients. Refer to the tutorials on this in Module 1 to be sure your profile is in top nick.
2. **Identify your Ideal Client Profile:** you need to articulate precisely the sort of target clients you are looking for. We use a Headline ICP for this, to make it easy for people to understand the kind of leads you're looking for. We've already looked at ICPs in this module.
3. **Create a referral card:** traditional business cards are actually just contact cards which usually only provide basic contact details and perhaps a strapline. A referral card is like two traditional business cards joined together and contains the following information: -

    - **Front –** traditional contact details
    - **Back –** some named client testimonials saying how great you are.
    - **Inside –** one face describing what you do and the other could either be your Headline ICP or a list of problems your offering overcomes.

10 Proven and Practical Referral Tips



So, the idea is to increase the number of leads you're given by intermediaries, satisfied clients or just regular people you know.

The following 10 tactics will help you do just that.

1 Stick to the 3 Golden Rules of Referral Requests

You just need to remember to always adhere to these simple rules; so here they are: -

1. Let people know you rely on referrals and that you would welcome any they can give you. You don't need to labour the point and you certainly don't want to appear desperate, but they should be in no doubt you would like them to refer leads to you.
2. Use your Headline ICP to explain the type of people you're looking for. We'll cover this in the module focused on winning new leads. This is a great way to encapsulate your ideal client in a way that your referrer can remember it.
3. Never make a potential referrer feel uncomfortable. When you start talking about referrals and mention you'd like them to refer leads onto you if they appear less than enthusiastic, they probably are. Back off immediately.

I know these are pretty obvious, but I'm surprised at how many people forget them.

2 Make Referrals Part of Your Onboarding Process

Client onboarding is when you set up the client in the first place and get your product or service going. This can take days or even weeks to achieve and is the time you start to form a working relationship with your clients.

This is a great time to set a marker in the sand about referrals and you'll know the right time because you'll feel a rapport and trust beginning to grow between you.

It's best to find a time and place you can have an informal conversation during which you explain to your client that you rely on referrals to grow your business (very easy if they were referred to you in the first place).

Add that you intend to do an outstanding job for them and ask if it would be acceptable, when you've completed the project (or the ongoing service has settled down) to bring up the subject of referrals again.

This link to a previous conversation makes it much easier to ask for referrals later down the line but more of this in the next tip.

Anyhow, here's a suggested script for you to start with. Naturally I expect you to adapt before adopting, but here goes.

It's a fact that we win most of our new clients as referrals from existing clients [that's how you came to us in the first place].

Now I intend for us to do an outstanding job for you and I wondered if it would be possible to ask a small favour when we've completed [the work] / [the service is working just the way you want it to] and you're delighted with what we've done?

All I'm going to do is ask if you know anybody else who could benefit from our product/service in the same way that you have.

Would this be OK?

Record their answer in your CRM system and if they say "yes" simply set up a future action to remind you to have this conversation.

If you do this, you'll find it much easier to broach the subject of referrals later on and they may even have had a chance to think about who they could refer on to you!

3 Ask When the Client Feels Most Positive Towards You

Here's an interesting finding from a study conducted by Texas University:

> ***"83% of satisfied customers would be happy to refer the supplier onto another potential buyer but only 29% actually do."***

You know what the difference between those two numbers is? Asking for the referral!

If you ask the 29% rockets up so it's vital that you ask, especially if you've done a great job at whatever you were engaged to do for them. But the question is: when to ask?

There are differing views on this. A lot of the more aggressive sales trainers urge you to ask immediately you strike the deal because a) the buyer feels good about you (or why else did he buy off you) and b) it doesn't matter what kind of job you do!

Personally, I'm not a fan of this but wouldn't be sniffy if you decided to follow that route. I prefer to finish the project, make a good job of it and relate this success to asking for referrals. It just feels right to me.

Here's an idea of how you could raise the subject with your client if you've already set the scene during the onboarding process: -

You remember at the start of the project I asked you if it would be alright to raise the subject of referrals with you? [Hopefully they'll say yes]

Well, as you may recall we win most our new clients as referrals from our established clients who we have delighted with our product or service.

And if you didn't raise it during the onboarding process: -

You may not know but we win most our new clients as referrals from our existing clients who we have delighted with our product/service. I was wondering if I could ask you to consider helping us in the same way? [Hopefully they'll say yes]

From here on in it's the same whether you set the scene or not.

So, my next question is pretty obvious: are you delighted with what we've done?

[If they say "no" this gives you the chance to understand and fix the problem. You can also ask ***"after we've fixed this issue for you can we have this conversation again?"***]
Thank you. I was wondering if you knew anybody else who could benefit from our product/service in the same way that you have? We're always on the lookout for [insert Headline ICP here or just say ***"people just like you"].***

If they come up with a name explain how they can make the introduction (see below for this). If they can't come up with a name, then close by saying:-

Well thank you for trying and just in case you think of anybody can I leave you with a couple of my business cards please? [Give them 3 or 4 cards]

As with all the sample scripts we give you it's important you adapt it for yourself to reflect your style, manner of speech and so on. The important thing though is that you ask!

4 Ask for Referrals as Part of Your Quality Control Process

Of course, I'm not sure what your quality control processes are but if you could build in a review either 6 weeks after the project finished or 6 weeks after the service was installed it would help.

Essentially you make contact in whatever way seems best for you but my advice would be one of the following: written letter, telephone call or visit. Whichever channel you use the structure is pretty much the same: -

- Outline the work you did for them and suggest that if they aren't entirely satisfied, they should let you know immediately so that you can rectify the problem.
- Ask for any feedback that could help you improve what you provide and the way you provide it.
- Explain that you rely on referrals from highly satisfied clients to grow your business.
- Suggest that if they felt they could refer anybody onto you who they feel would benefit in the same they have you would be grateful. You can also include your Headline ICP too.
- Include 3 referral cards.
- End with a thank you and whatever "next contact" message you feel is appropriate.

Here's an example that you could adapt for your own purposes or translate into conversation to be delivered in person or over the telephone (you'd have to send the business cards through the post if you use the 'phone).

Dear Mr Smith,

It's been 6 weeks since we provided our <<whatever you did for them >> and I wanted to take this opportunity to ensure you were still 100% satisfied with the work we completed for you.

I would like to stress that I need you to be entirely happy with our work and if you are anything less than this then please contact me directly on 01564 627 050 so I can

arrange to make things right. We receive very few complaints, but we resolve every single one of them.

On a different matter, you may not know but we win almost all our new clients as referrals from our existing clients who we have delighted with our product/service. In fact, if you recall, that's how you came to us.

Anyhow, I was wondering if I could ask you for an enormous favour: would you consider helping us in the same way? If you'd rather not or can't think of anybody right now, we completely understand and it's perfectly fine by us.

However, if you feel you'd like to help, then can I remind you we're looking for business owners of service companies who are not entirely satisfied with the way their business is growing. Our hotspots are recruitment companies; professional services firms and IT services companies.

I've included a couple of business cards for you to pass on, if the need arises or, of course, you can always call me or drop me an email.

Once again, thank you so much for choosing Flair to work with and I hope we can work together again sometime in the future.

Yours sincerely

Then sign it and write a PS in ink: -

PS Thanks in advance for anything you do for us but once again, not a problem if you'd prefer not to ☺

Once again this is only a suggested format – you can change it to suit your own needs. It's also worth experimenting with different versions to see which works best.

One last thing: the bigger the deal the more effort you need to invest in this. Very small pieces of work would get the letter; larger pieces would receive a phone call and your best deals would warrant a visit, perhaps even over lunch.

5 Use a Referral Card Instead of a Business Card

We discuss how useful Referral Cards are to the professional relationship builder in the section on Networking Events in this unit.

They are much more than a business card, which mainly contains contact information. Referral cards are effectively a four-sided business card that you fold in two.

You can include such information as client testimonials; a description of what you do; your ideal client profile or, as I do, the triggers for engaging you. You decide, but the result is a little mini-brochure you can give out like confetti because they are so cheap.

The great part is that you don't need your referrer to remember what you do or who you do it with; you just give them a referral card and it does it for you!

We've provided a separate guide on referral cards in this unit which is worth downloading and reading, even though I accept you can't create your own without the permission of your branding people.

There's no harm in asking them though, right?

6 Always Show Respect to the Referrer

Let me start by making clear that I'm not suggesting you treat people who refer leads to you with a lack of respect.

But what I am saying is that sometimes when we're busy (and I count myself in on this too) we forget to do things that could lead our referrers to believe that we don't value or appreciate what they have done for us.

It happens; we don't mean it to but it does. If you've ever done a favour for somebody who hasn't said thank you, you'll know exactly what I mean.

So, I'm going to give you a simple 3 step routine to follow every time you receive a referral, which will clearly demonstrate to your referrer that you value and appreciate them.

Here it is: -

1. **Acknowledge:** immediately drop them a mail, a phone call, a text or a message on social media to acknowledge the receipt of the introduction and to thank them.

2. **Act**: don't wait around for days before you contact the lead. This is one of the biggest bear-traps people fall into and it's deadly. It makes the referrer feel the lead isn't important to you. **Do this too many times and just watch those leads dry up!**

3. **Update:** whatever the outcome you need to let the referrer know and thank them again. Telephone is best but a text or email can work if you're short of time. Here are words you can use in the 3 possible outcomes to an introduction: -

   a. ***Thank you so much for introducing me to Alice who we just converted into a client. I really appreciate the introduction and I owe you a lunch!***

   b. ***Thank you so much for introducing me to Richard. On this occasion, we couldn't make it work but I really appreciate the introduction and I think he's going to be a useful person to know going forward.***

   c. ***A quick update on Kim, who you referred to me recently. First, thanks for making the introduction, very kind of you. Right now, we can't do anything together but I'm sure we will in the not too distant future so I'll keep you posted on developments.***

It's so simple: like putting the petrol cap back on the tank before you go in to pay. It's just part of the process and you need to do it.

I'd say this is one of the silent killers when it comes to decreasing the number of referrals you attract. It's so dangerous if we forget but highly reinforcing when we remember.

My advice is to make this a habit: Acknowledge; Act and Update.

7 Reward the Referrer

Let's face it most of us like free stuff especially if we feel we've earned it in some way. Giving rewards for referrals really works for some referrers, whilst others are less bothered.

However, before we go any further, you must seek advice from the person in your organisation responsible for the Bribery Act. It's very unlikely that rewarding somebody who passes you a lead contravenes the act but you will need to understand your organisation's stance on this.

<u>You will also need to understand the policy your referrer has towards the Bribery Act – this is likely to be more restrictive than your own firm's rules.</u>

The first thing to recognise is that people value different things so you need to be sure what a referrer would appreciate by way of a reward.

Years ago, I did a favour for one of my suppliers who wanted to repay me by taking me to a gentlemen's evening. Not what you think; it was a men-only black-tie amateur boxing event but just not my thing at all. I politely declined and no harm done, but had they known me a little better they would have chosen something different.

Your first job is to learn the preferences and interests of any referrer; client or otherwise. This is easy to do especially if you base it on the list I'm going to share with you in a moment. Simply engaging people in conversation on a range of interests and gauging their responses will tell you all you need to know.

Once you have this information make a note of it on your CRM system in a place where you can search on it in the future e.g. which of my contacts like golf? Handy if you're running a golf day!

So, what can you use to reward people? Here are some ideas to get you started: -

- **Leads:** if you can provide high-quality leads in return this must be the most powerful currency of all. Understand what your referrers ICP is and do what you can.

- **Sporting Events:** spoiled for choice here. Cricket, horse-racing, football, rugby, golf, one of my clients took one of his clients' trout fishing once! Warning: these can be expensive!

- **Entertainment Events:** the theatre, pop concerts, ballet, opera are all available via direct booking or events companies. This is a much cheaper alternative to a sporting event but can be highly effective. Many events companies can also include a meal of some kind too.

- **Food and drink:** probably the most obvious, cheapest and easiest to arrange. Lunch, dinner or drinks after work cut it for a lot of people.

- **Seminars:** if you tap into a business interest your referrer has you may be able to reward them with information or know-how in that space. Taking somebody as a guest to a paid seminar you know they're interested in can be highly effective. One of my friends loves TEDx conferences and takes his clients there – they love it apparently.

- **Discount:** giving a client a discount on the next thing they buy off you as a reward can be a strong inducement for some people and may even encourage them to make another purchase with you!
- **Gift:** this is perhaps the trickiest reward of all and the one most likely to contravene either your or your referrers rules on the Bribery Act. Some chocolates, bottles of wine or spirits, tickets for two to an event, a bouquet of flowers – I've seen them all but tread very carefully.

One thing you must avoid at all costs is offering money, even if the referrer asks for it or heavily hints they would like it. This is far too dangerous and I urge you to not even consider it even if the leads dry up from that person!

One last thing: do make sure the reward is commensurate to the lead. If somebody introduces you to a million-dollar deal "a quick drink after work" probably isn't going to cut the mustard.

8 Make it Easy for People to Refer Leads to You

If people think making a referral is going to be time-consuming or a bother many of them just won't do it. So, you should make it as easy as possible – preferably a one-step process.

This is as important for internal referrers, your colleagues and co-workers, as it is for external referrers! The same rules apply.

This is my favourite approach because it's so simple: -

If you come across anybody you think I could help just drop me an email, a text or give me a call.

You can also back this up, as we discussed above, by leaving referral or business cards with people so they can just hand them out on your behalf. This is even less effort for them so may increase the chances of them doing it.

Something else I want to discuss is how you engage after a referrer informs you they have a lead for you. You have two clear choices here.

Email Introduction

There is a proven approach to this which I’m going to share with you now. Feel free to tinker with the words but I would urge you to leave the structure of the message unchanged.

When somebody approaches you with a lead your response should be: -

Thanks for this referral, it sounds really interesting. I wonder if I could ask a favour of you. Would you be happy to send them an email and copy me in please. All you need to say is something like “I’d like to introduce you to Mike because I think you guys have some common ground and I’m pretty certain you should be talking”. I’ll take it from there.

This makes it easy for the referrer to pass on responsibility for the lead over to you. I use this all the time and I can’t recall a time when anybody refused to do it for me.

When you write your reply to the email, that the referrer sends to the lead and copies you into, you might try this.

Thanks <<referrer’s name>> as always, I really appreciate the introduction.

Hi <<leads name>> I normally find in these circumstances a short informal telephone call is the simplest way to see if we have any common ground to move forward onto.

With your permission, I’ll call you in the next few days but if you’d rather I didn’t do this, or you have a specific date and time that you’d prefer to speak please respond to this email.

Thanks again << referrers name>> and I’ll look forward to speaking to you anon << leads name >>.

This approach gives the lead the chance to refuse your offer to speak or, hopefully, confirm a date and time they are happy to take the call.

You can usually assess the strength of the introduction by the way the lead responds to this email. The ones who suggest a time to call are the most serious; those who respond in the affirmative are next and those who don’t respond at all are probably lukewarm about it.

In Person Introduction

If you recognise that the lead is a valuable one and the relationship you have with the referrer is strong enough, you could suggest a joint meeting perhaps over breakfast (my favourite) or lunch. Personally, I think dinner is one step too far, but you may disagree.
All you need to say is something such as: -

Thanks << referrers name >> she sounds like a great lead. How would you feel if I hosted a breakfast meeting or a lunch and all three of us could meet up at the same time?

If they're not keen you can always revert to the email introduction. But if they agree I promise it will start your new relationship on much firmer ground.

Just a couple more things to bear in mind. Firstly, a referrer should never be under the impression that they must do your selling for you. Their role is to make the introduction, after that they can simply step back – nice and easy for them. This is especially true for internal referrers when cross-selling.

The final point is about internal referrers too: treat them just the same as external referrers. People are people and making it easy for them to a) spot a good lead (headline ICP) and b) make the introduction are crucial if you want to encourage more cross-selling.

9 Provide Valuable Content People Can Distribute for You

We call these "currencies" and we'll explore them in a lot more detail in the module that deals with starting a conversation with a new prospect. However, for now just think of a currency as a piece of knowledge or know-how that a referrer would find useful or interesting.

For example, supposing your target group were business owners. You might conduct a study with a small group of business owners to identify the challenges they face in one aspect of their business, say hiring good quality staff, and more importantly, what they are doing to overcome this challenge.

You then produce a short, punchy and easy to read document which summarises your results and perhaps suggests what people should do based upon the successes of the participants in your study. I'm thinking or 4 or 5 pages at the most.

Other ideas for currencies are one-page checklists; simple 3-step how-to guides focused on one thing and interviews with prominent people that the recipient of the currency would find attractive. We'll look at currencies in a lot more detail later, but for now why not engage your client community to discover what they find of interest. This information will come in very handy later.

The last page of this is your chance to pass on some key messages about yourself and your offering such as: -

- Your name, company and contact details.
- Social media channels you subscribe to: your LinkedIn URL; Twitter account name etc.
- The people you help – your Headline ICP.
- What you do and the problems you solve – extracts from your Elevator Speech.
- Perhaps a named testimonial from a satisfied client or two.

You can then send this to referrers and suggest that if they find it useful, you'd be very happy for them to pass it on to anybody else they feel would also find it useful.

If you hit upon the right currency, they can go viral. So, for no cost and little time you've managed to get your name into your target market and associated with something of value. You can also add links where people can click to receive more free stuff; in exchange for their email address of course!

10 Make Full Use of Social Media

Social media can be a powerful ally in your quest to attract more high-quality referrals but many people fail to use it for this purpose. Best not be one of those guys.

We have a simple 3 step approach to leveraging the power of social media to help you win more referrals.

a) Connect to as many potential referrers as you can

The people you aren't connected to on LinkedIn won't see what you post. Likewise, the people who don't follow you on Twitter won't see what you Tweet so step number one is to connect to as many people as you can, especially on LinkedIn.

That way when you publish the kind of posts we're going to suggest to you, your referrers stand a chance of reading them.

b) Post what you do

Now, there's a trick to this. You should avoid posts that explicitly tell people what you do because they look like adverts and that's not really the done thing on social media.

Instead, you can post what you've done, what you're doing or what you're going to do and the reader can work it out for themselves. Here are some examples I might post: -

Just finished a Growth Kickstarter workshop for a recruitment company. They now have complete clarity on their growth plan. ALL IN 1 DAY!

Message: I run workshops that help recruitment companies create a plan to grow their businesses and I do it all on one day.

Pumped up about tomorrow. Working with a law firm to identify 10 hot prospects and how we can start a conversation with them. #excited

Message: I do practical sales work with my clients; I work at the sharp end of finding new clients and I can show people how to start a conversation with them which is crazy-hard.

I just pitched to somebody who couldn't believe all my work is contingent. "I only pay you as much of your invoice as I think is fair?" Yep!

Message: I put my money where my mouth is and guarantee my clients always get value for money.

The deal is you only should publish these posts every now and again. Perhaps once or twice a week and they're easy to do because you just need to think what you're doing and publish it.

c) Publish when you get a referral or a testimonial

This is pretty obvious really. Reminding people you seek referrals and then announcing when you receive them is a great way to drill your message home to the people who you know but in a subtle way.

I also think it's nice when people give me a testimonial because it sends out the message: "I'm good at what I do because my clients say I am".

Let's look at a few examples now.

Absolutely thrilled to receive an introduction to a great new prospect today. Thank you Alice – you know who you are. #humbled

Most of our new clients come from referrals – just got a great lead in from one of my oldest clients. Thanks guys!

Just got this testimonial from Fred Smith at XYZ Plc. Thank you so much; I've very grateful to you sir. <<link to video testimonial >>

I always appreciate when somebody takes the trouble to give me a testimonial. Thank you Janet. #flattered << publish a simple graphic containing your testimonial e.g. >>

Important: Only ever mention the name of a testimonial provider if you have their express permission (in an email) to do so!

Referral Strategy

We know that if we make referrers feel good about themselves, and good about us, they are more likely to refer more leads to us. Some of the 10 referrals tips we looked at above will help us do that, but we can do more.

In this section, we're going to share a simple strategy you can adopt to help you build even stronger relationships with your referrers. If you use it alongside our referral tips it will boost the number of referrals you attract even more.

We've also listed out a few obvious (but often forgotten) reminders of good "relationship building" behaviour. But to begin with let's look at the premise that sits behind our Referral Strategy.

> "People must never know that they are part of a process even though they are!"

As soon as people know they are being "processed" your relationship with them will begin to deteriorate. Who wants to be a number on a database, a name on a sales pipeline or a resource being moved through a process?

How do you feel when: -

- Cold callers telephone you with their carefully crafted scripts.
- You turn up for an appointment and the receptionist treats you as though you're an anonymous resource to be processed.
- The waiter asks if your food is OK when you know they don't really care.
- People you're dealing with take no interest in you as a person – it's all business.
- It's obvious it's all about making money out of you.

Now, let's be clear: we do need processes because they make us more effective, but the big deal is never to make it obvious. People may suspect it, they probably use processes themselves, but so long as it's not obvious that they're in a process they'll feel much warmer towards you.

We have three simple tactics you can use to make this happen, so let's look at them now.

1 Customise Your Communications

Let me begin by defining what a communication is: it's any means that you interact with your referrer. For example, telephone calls; letters; emails; reports; social media posts; even meeting in person.

So, here's the skinny: whenever you communicate with anybody who you want a strong relationship with, you must change it so that they can see it's been sent to them and couldn't have been sent to anybody else. This is easy to do and yet enormously powerful.

You can do in three ways: -

- Use their name when it isn't necessary to do so.
- Add in a personal message just for them.
- Include information that is only relevant to them.

You can even combine any of the above into the same communication. Let's look at some examples.

Name

If you come to see me at our offices, and I know you're coming, when you arrive there will be a parking space with your name and your company logo on it. You'll also have a blank notepad waiting for you with your name on the front.

Message: we know you're coming; you matter to us; you are an important individual and will be treated as such.

Personal Message

You need to send a client a form through the post. There is a standard letter which you are unable to change so you write a PS in pen that says: *"Have a look at this and call me on 01234 567 890 if you have any queries".*

Hand-written anything is very powerful. We use picture postcards to send short messages to people. Nobody else does it so they are usually read and people often remark upon them. It also shows I've taken time out for them. Naturally you can't send classified information this way, but you can use it instead of a social media post.

Supposing you needed to send an email to somebody with an important attachment. You could start or finish the email with the following: *"I see from LinkedIn you've just completed your first triathlon. If it's not too late to sponsor you, please send over the Just Giving link."*

Message: I take an interest in you; you are more than just a source of revenue; I want to give something back.

Relevant Information

You decide to invite somebody to connect on LinkedIn. Here are two approaches you could take – which one do you think would appeal the most:

Hi Jayne, I'd like to join your LinkedIn network.

Which is the default LinkedIn invitation message.

Or

Hi Jayne,

I see from your LinkedIn profile that you're passionate about client service and especially gathering client feedback in person.

As you can see from my profile I am too, so I thought it might be useful to connect on LinkedIn because of this and our shared interest in recruitment. I hope you agree.

Regards … Mike

I know from testing a range of different LinkedIn connection request messages that the more personal you make it (without being creepy of course) the more likely you are to receive an acceptance.

Message: you are an individual; I have taken the time to learn about you; we have shared values; I have not just pressed CONNECT to a load of people on LinkedIn, you being one of them.

2 Get Personal!

Before I dig deeper into this tactic let me make one thing clear and it's an important one: **never refer to personal information unless that person has given it to you themselves and it is appropriate to do so.** A bear-trap it's all too easy to fall into, I'm afraid.

When I was a freelancer, nothing irritated me more than recruiters I didn't know opening a phone call with "Hi Mike, how's Barbara and the kids?". They'd learned that about me from their database and used it, even though I'd never told them. Harmful and dangerous and to be avoided!

> "When interacting with people, create opportunities to learn personal things about them.
> Make a note of it on their CRM record.
> Refer to it in later interactions."

Here's a list of things you can learn about people and then refer to later: -

- **Family details:** name of husband, wife, partner, kids, dogs etc.
- **Interests:** hobbies, sports team they follow, holidays, activities they like to do or watch.
- **Dates:** birthdays, anniversaries, work things [use with care!].

- **Events:** something that that is happening in their lives, e.g. running a triathlon, getting married, moving house, having a baby, bought a dog, going on holiday.
- **Preferences:** how they like their tea; lunch or dinner for social meetings, call or email.

Now, I'm not saying you need interrogate people; the contrary in fact. But just as you would do with new friends: gradually learn information about them and share the same information about you with them. Do it gently and naturally and you'll be just fine.

If you suspect you're being too pushy or forward you almost certainly are!

If you treat your clients and your referrers, 95% the same as you do your friends, you'll not go too far wrong. Let's face it, building personal relationships is a skill everybody has and business relationship building is pretty much the same.

If somebody I know well; somebody I've had personal conversations with, asks me "How's Barbara and the kids?" it strengthens and enriches the conversation and the relationship. But only because it's appropriate and a natural thing to do, if you know somebody well.

3 Act on their Needs and Preferences

As per tactic number 2 you will be collecting and storing personal information about your clients and other potential referrers. You'll also be referring to it in your communications, where it's appropriate but you can use this information in a more powerful way: by acting on it.

Here are some examples: -

- Remember what drink people prefer and offer them that one first.
- Send birthday wishes or, if the relationship is strong enough, a birthday card.
- Invite people to a seminar on a subject you know they would be interested in.
- Call people at a time you know they like to be contacted
- Ask people to a sporting or social event you know they will want to attend.
- Send them press clippings of something you know they'll be interested in.

So here you're not enriching a work communication with some personal stuff; <u>the whole point of the communication is the personal stuff</u>. Very powerful and a great way to build a strong relationship with somebody who is important to you.

Who would feel part of a process when they're treated pretty much like friends? But there is one more thing you need to consider that some people find it hard to do but you absolutely must. If you fail to do this, you stand a chance of harming not strengthening your relationships.

Be authentic in all things.

Treating business contacts 95% the same as your friends means they must be 95% the same as your friends!

Nothing else is acceptable.

I never think "I know I'll send this over to Fred Bloggs because it will make my business relationship with him stronger". I send it to Fred because I know he'll like it just like I would if he was one of my mates.

Of course, people know why they are being invited to the cricket for the day but that's OK – it's the small things that must be sincere! People can smell insincerity at 100 paces and they don't like it!

Reminders of Good Relationship Building Behaviour

Here are some great ways to make dealing with you a pleasure. They're free and cost little or no time: -

1. Keep your promises no matter how small they are.
2. If you can't deliver what you promised tell them as soon as you can.
3. Avoid using jargon which will only confuse and alienate people.
4. Always make yourself available, maybe not 24/7 but as much as possible.
5. Never keep people waiting – an appointment should start at the agreed start time.
6. Do something unexpected that will add real value to them.
7. Make your encounters as enjoyable and fun as you can.
8. If your client isn't happy find out why and fix it. It doesn't matter whose fault it is.
9. **Above all else put their needs and preferences above your own!**

Summary

The idea is to use these tactics, and the referral strategy, to make your own bespoke Proactive Referral System. One that you feel comfortable with and works for you. You'll need to try everything, experiment and review the outcomes and so gradually adapt everything to your own needs. Do this and it's harder to fail than succeed.

Now, your Proactive Referral System can help you increase the number of referrals you receive and the referrals strategy will boost this still further, but only if you can put a tick next to each of the following: -

- ✓ **You need to deliver what you promised as an absolute minimum.** However, to improve your chances of winning referrals you need to exceed the expectations of your clients.
- ✓ **You must persevere.** Adapt and adopt as many of the tactics as you can and fully embrace the referrals strategy to create your very own bespoke Proactive Referral System.
- ✓ **Accept that results will take time to appear.** Not only do you need to perfect your usage of the tactics but they then need time to take root in your client and introducer community. Stick with it – the results will come.

I've found by using these simple tools and techniques you can increase the number of referrals you receive, although it naturally takes time. They don't take much effort; have little or no associated costs and they work but you do need to be organised and disciplined.

If I wanted to increase the number of referrals I was receiving but could only focus on only three things they would be these: -

1. Have some Referral Cards printed up and then give them out like confetti.
2. Communicate my Headline Ideal Client Profile to as many people as possible.
3. Make dealing with me a pleasure – make people feel good about themselves every encounter I have. Treating people 95% like you do your friends will do this for you!

Added to that, of course, you need to do an exceptional job for each and every client – quality; quality; quality!