asktra

Act Fast

A referral is one of the most personal and trusted acts in the business. Always plan how the introduction will be made ahead of time.

Idea

As soon as a referral request is received, speak with the client or influencer to gather information about the referral as well as guidance on the introduction. Send a hand-written thank you note.

Also, determine who will own and lead the opportunity within the firm. Track the source of the referral in your CRM and who owns it.

Follow-through is everything—it's when you have maximum exposure with the client or influencer and the referral. Have a plan in place so that everyone knows what to do when you get a referral.

<This occurs often> What happens when one of your favorite clients just referred someone to your firm, but it's not a good fit?

It feels awkward, but it's OK to say no, and it probably won't be as bad as you think. So relax, but address it:

- Let the referral know you can't help them. Understand that whatever you say will be shared with the client who referred them to you.
- Share with your client that you couldn't help the recent referral. This is a golden opportunity to share your memorable story.

Idea Sheets provide quick and actionable suggestions to drive more referrals and sales. Visit www.referralsafe.com/asktra frequently for new additions.