

After the Sale

Congratulations! You won a new client. Celebrate the win. Let everyone in the firm know. Share tips and tricks you picked up that may benefit others.



★ Don't miss this opportunity. Educate your newest client by sharing your memorable story (what makes you special). A new client who comes in as a referral should provide more referrals in the future. Referrals make AMAZING advocates.

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Be giddy after closing a sale. It's cool. We are all busy, but stop and reflect on the journey. If others were involved, make sure they are recognized and rewarded.

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1. What part(s) of the process worked well?
2. What part(s) can be improved?
3. What can we add to the process?
4. What can be removed from the process?

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

