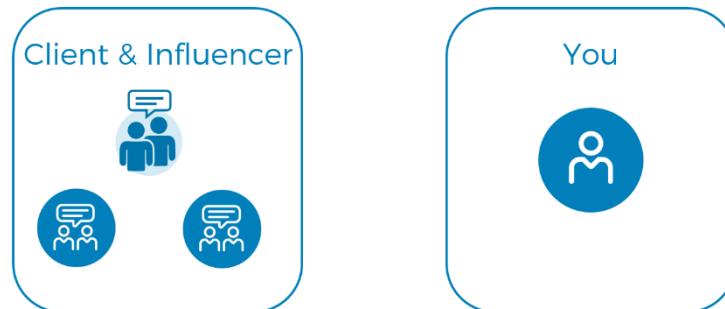


## How Referrals Happen

Referrals are word-of-mouth marketing. When someone refers you, the words coming from your client or influencer are not yours. You are not there, but you *can* affect the conversation.

### Word-of-Mouth



### Two Types

There are two basic types of referrals:

**Personal Recommendation:** A referral is made after a client or influencer hears someone say something like “I’m unhappy with my financial advisor, and I’m looking for a new one.”

**Broad-Based Recommendation:** A client or influencer loves talking about their financial advisor. Then someone pops up and says “Can they do that for me?” This type of recommendation often happens through social media.

### Ideas

Because referrals happen without you, a memorable story is important. Share **memorable stories** with clients about who benefits from the help you specialize in. Then explain what to do when someone has an introduction.

Idea Sheets provide quick and actionable suggestions to drive more referrals and sales. Visit [www.referralsafe.com/asktra](http://www.referralsafe.com/asktra) frequently for new additions.