

LESSON FIFTEEN

In this video I want to show you the best way to ask for referrals. You are going to be asking your past and your existing clients for referrals, and the reason being is because they are the people that know, like, and trust you. They already know what you do, how you do it, and how you are best placed to work with individuals. When they get asked questions by other people, they can answer them on your behalf to tell them exactly what it is, and what their relationship has been like in working with you over the past number of months.

What do most people do when they ask for referrals? Typically, what they say is, "Do you know of anybody that needs help in X, if so, please give them my name". That is the way most people would ask for referrals. However, it is the absolute incorrect way, because when you get asked that question yourself, "If you know of anybody that needs help with X, can you send them my way," your brain literally cannot comprehend. In previous videos I showed you that your brain works like a Google engine so, therefore, you have to give your brain specific questions. The reason why we bring people through referral conversations is to ask those particular questions and to bring them through a sequence.

I use the analogy of a filing cabinet. If you remember the old filing cabinets, where it might have three or four drawers, a big, huge, massive cabinet that sat in the corner. That is really what we are going to be using as an analogy to bring people through the actual questions. First of all, we are going to bring them to the filing cabinet, then we are going to ask them to open the top drawer, and then we are going to ask them to take particular files out of that top drawer and give those contact details to yourself. That is really what we are going to be doing as we are asking the questions to our past or existing clients.

What is the first thing that you need to do? A), you need to have a conversation with your clients. It has to be a comfortable conversation. What I mean by that is that you are not particularly discussing business, and you are not discussing social life. It is a case whereby it is in between that you are reviewing things, or it is a way that you can finish your discussion around the business side of things and say, "Hello, Mr. Client, I have got something that I want to discuss with you. Is it okay if I ask you a couple of questions?" That is how you are separating out the two different conversations.

The first question you want to ask in order for them to get to the filing cabinet is, "In all your time in business you have probably met other accountants?" Let's just assume I am looking for accountants, so I am asking my past, or existing client that question. The reason for asking that particular question is I am getting them to go to the particular filing cabinet where they have all those accountants. This is all in their

mind, but this is how I am getting them to access those particular files that I want them to access.

Now, I have got them to the filing cabinet whereby they are now listing all the accountants that they have come across over the years. Next question will be around, "Okay, so are there a number of accountants that stand out for you?" Now, I am asking them to go to the top drawer in that filing cabinet and out of all the accountants that they know they are now going to distil it into maybe two, three, or four accountants that would be a good fit, or that stand out for them as being the prominent accountants that they would know. Then, I would go onto the next question. "Which ones do you think it would be good for me to have a cup of coffee with?"

There are two reasons I am asking that question. One is, I want to make sure that they are going to be a good connection and, second of all, I am asking in such a way that I am not asking to sell to them. I am not asking to have any onerous activities with them. All I am saying is, "Would it be okay to have a cup of coffee with them," so, therefore, there is not a huge amount of requirement from my existing, or my past, client to give to me. My question is, "Which ones do you think it would be good for me to meet over a cup of coffee?" Now, they are in that file, and they are now looking for the files in the top drawer in the filing cabinet, and in their mind's eye they are taking out those particular files.

Then I will go onto, "So, what is the best way for me to get in contact with them, is it by phone, or by email?" Now, I am asking that for a particular reason, because now I am asking them to open the files. They may volunteer more information and say, "Look, this particular person, this is how long he has been in business. This is what he is all about. Here is what he does." They give me a few bits of information that they know about that particular individual. They may say, "Well, no, he might prefer to get an email, as opposed to a phone call." I then gather that information by asking those kind of questions.

The next question is, "Is it okay if I mention your name when I get in contact with him?" Again, what I am doing in that particular question is I am asking their permission. I am not going coldly to the actual client that I am being referred to. I am asking their permission if I can use their name. Second of all, I am the one that is taking the action, so, therefore, I am not asking my client to make an introduction for me. I am the one that is actually taking the action so, therefore, if I need a phone number, or an email address, I am then going to ask for that particular information.

Let me go through it again. I want you to keep in your mind's eye by way of that filing cabinet, and you will see how it will follow through. The first question I am going to ask is, "So, in all your time in business you have probably met other

accountants?" That is the first question. They are now thinking about all the other accountants. Now I will go onto the next question. "So, are there a number that stand out for you?" Then, they will be thinking and saying, "Yeah, okay, there are a few that stand out for me. There is probably about three or four that stand out." "So, which ones do you think will be good for me to have a cup of coffee with?" Now, they are whittling down, or filtering down in their mind. "Actually, these two individuals will be good for you to have a cup of coffee with." Therefore, my next question will be, "So, what is the best way for me to get in contact with them. Is it by phone, or by email?" That is where I am asking for their contact details. Then, I am just asking for their permission. "Is it okay if I mention your name when I contact them by phone, or by email?" That is literally the sequence that you need to follow when you are asking for referrals. If you are not asking for referrals right now, well then it means you are missing a lot of business and you are leaving it on the table.

As you have been working with past and current clients, you are establishing a huge amount of trust with them. They are people that know you, like you, and trust you. Therefore, they are the ones that are best placed, as I said at the beginning of this particular video. Therefore, if you are not asking them to introduce you to somebody else by way of asking for referrals, then you are leaving an awful lot of business on the table. What I would ask you to do is make sure you have those questions laid out for yourself. Practice them, then when you go to meet with a past, or an existing client, then you know exactly what the sequence is to follow. Make sure you practice them but, more importantly, make sure you are having the conversations.

Over the next couple of weeks please set up meetings with past, and current clients, for the purpose of absolutely asking for referrals and when you have gotten those referrals then you can have follow on with a value conversation or get an introduction to those particular people. That is the exercise for this particular video. Make sure you practice the actual conversation itself, and I will see you on the next video.

Exercise 23

Referrals...

My referral script is:

In all your time in business, you have probably met other...

Are there a number of them that stand out for you?

Which ones do you think it would be good for me to have coffee with?

What is the best way to get in contact with them – phone or email? = opening the file.

Is it ok if I mention your name when I call / email?

