

Referral Strategies

AGENDA:

- 1. Your outlook on the next 12 months
- 2. Performance over the last 6 months

- 3. Upcoming opportunities
- 4. Referral discussion

Agenda Item



Negotiation

"Hypothetically – if I did agree to discount fees for the first year of the relationship – how comfortable would you be introducing me to the rest of the Physicians in the practice?"



Targeted Nudge

"I'm really keen to meet with your Accountant. Do you think you could invite them along?"



Plus One

"Do you know any other Cardiologists that would like to come to this sort of event?"



Advice Request

"I'm hoping you can provide me with a little bit of advice. If you were me, how would you approach other Cardiologists to discuss helping them manage their wealth?"



Generational

"I'm interested to know whether you think I should speak to any of your children about the way they're managing their wealth. What are your thoughts on that?"



Specific Target

"I've been working with quite a few Lawyers recently and I thought I should ask whether you think your Lawyer would be interested in meeting with me?"



Reference Point

"Sometimes prospective clients ask to speak to a few of my existing clients. Obviously I wouldn't disclose anything personal, but if I was asked for a reference, would you be open to acting in that capacity?"



Capacity Request

"I've recently restructured my client group and I'm back in the market for a few more key clients, so if you know anyone I should talk to, please feel free to give them my details."



Make it Easier?

"Is there anything I can do to make it easier for you to refer me?"



Social Proof

Customer: "How are you?"
Adviser: "Great thanks. I've been getting quite a few referrals through, so I've been quite busy. What can I do for you today?"



Hopeful Request

"If you know anyone else, please feel free to introduce them to me ..."



**Soft/
Indirect**

**Hard/
Directive**