



REFERRALS

REFERRALS

BUILD STRONG RELATIONSHIPS

- BEFORE ASKING FOR REFERRALS, ESTABLISH TRUST AND RAPPORT
- BE RESPONSIVE, EMPATHETIC, AND ATTENTIVE TO THE CLIENTS NEEDS
- WHEN CLIENTS FEEL THAT YOU GENUINELY CARE ABOUT THEM AND THEIR WELL-BEING, THEY'LL BE MORE LIKELY TO RECOMMEND YOU TO OTHERS

REFERRALS

TIMING IS KEY

- FIND THE RIGHT MOMENT TO ASK FOR REFERRALS
- THIS SHOULD BE AFTER
 - YOU'VE PROVIDED EXCEPTIONAL SERVICE
 - SOLVED A PROBLEM FOR YOUR CLIENT
 - RECEIVED POSITIVE FEEDBACK
- CLIENTS ARE MORE LIKELY TO REFER WHEN THEY'RE FEELING SATISFIED WITH YOUR PERFORMANCE

REFERRALS

BE SPECIFIC

- MAKE IT EASY FOR YOUR CLIENTS TO THINK OF POTENTIAL REFERRALS
- BE SPECIFIC ABOUT THE TYPES OF CLIENTS YOU'RE LOOKING FOR
- DESCRIBE THE TARGET REFERRAL TYPE BY THEIR INSURANCE NEEDS, OR PARTICULAR INSURANCE THAT YOU SPECIALIZE IN

REFERRALS

SIMPLE REFERRAL PROCESS

- MAKE IT EASY FOR YOUR CLIENTS TO REFER YOU, EXPLAIN HOW THEY CAN SEND YOU ONE
- START THE GROUP TEXT/EMAIL
- USE AN EASY TO SCAN QR CODE
- EOI CHANGES
 - CALL THE LENDER
 - BE QUICK TO SEND THE EOI
 - BE THEIR GO-TO C.O.I.

REFERRALS

OFFER INCENTIVES OR REWARDS

- IMPLEMENT A REFERRAL REWARDS PROGRAM TO MOTIVATE YOUR CLIENTS TO PROVIDE REFERRALS
- OFFER GIFT CARDS
- DELIVER COFFEE OR TREATS IF LOCAL
- STAY COMPLIANT AND ETHICAL

WHAT DO YOU WANT FOR DINNER?

HAVE YOU EVER BEEN ASKED "WHAT DO YOU WANT FOR DINNER" AND YOU DON'T KNOW? NEITHER DO YOUR CLIENTS WHEN YOU ASK FOR A REFERRAL

- **ROLE PLAY YOUR REFERRAL ASK**
- **GET SPECIFIC ON THE PERFECT REFERRED CLIENT**
 - **WHO ARE THEY?**
 - **WHAT DO THEY DO FOR A LIVING?**
 - **DO THEY OWN THEIR HOME?**
- **WHO DO YOU ACTUALLY WANT FOR A CLIENT?**
- **DESCRIBE THEM!**