

Keep in Touch | Module #9

Giving, Asking For and Receiving Referrals

Referrals, probably one of the most coveted items in the entrepreneur's world. We're starting with giving a great referral, because generally, you'll give before you receive. And, when you're giving *great* referrals, people really appreciate it.

After that we'll cover how to ask for a referral. And finally, how to receive a referral.

1. Giving a Great Referral

All referrals are not created equal. Following some of these suggestions will keep your referrals among the best!

When you meet someone and find out what they do, it should prompt you to run through the people you know that might be a good fit (do this in your head).

Additionally, you can be thinking about the people who might be a good connection for them. This might be a referral partner, someone that provides a service they need (or will need) or it might be something else entirely.

In the "someone else entirely" area, I know an attorney who specializes in entrepreneurs who work from home. When I was out of town at an event I became friends with someone else with the same specialty from a neighboring state. I thought it might be nice if they connected and had someone else to talk to who understood exactly their challenges. I asked the new person if she would find this connection useful, she said yes, I introduced them and from what I understand it's been a good connection for both of them.

1. Qualify the referral or connection

In the above story you'll notice I asked my new friend if connecting her to my other friend would be useful. This was qualifying the connection. I was making sure that at least one person was interested in the connection and would take the lead to reach out to the other person after the connection was made. There's no reason to do the introduction if someone isn't interested.

Referrals are slightly different. If you're referring someone, it's good to make sure the person who is the potential client/purchaser is interested in the introduction! It's frustrating to be on either side of a referral that's not qualified. If you're the potential client, suddenly you have someone calling that thinks you're interested in their service, when you're not. And if you're the person with the service, you think that this person is interested and you're spending time trying to contact them, but you don't know that you're wasting your time.

So, make sure that the person potentially purchasing is interested in the service or product. And if you're connecting one person with another for some other reason, make sure that at least one person is expecting and looking forward to the connection.

What does an email or phone call to make sure the referral is qualified look like?

Hi *{name}*,

Last time we talked I remember that you mentioned *{problem}*. Well today I met *{name}* and he helps people/businesses with exactly that. You can learn more about him here *{website}*.

However, I'd love to do a warm introduction so you can get to know him a bit better and see if he's a good fit. Personally, I think he's great and *{share an experience you've had with this person or observation}*.

Let me know if you're interested in that warm email introduction.

{your name}

Of course, the above script is just a starting point. When you have someone to refer, creating your own will come more naturally.

I do want to stress that *one* of the people being introduced should be expecting it. Meaning, if I receive a referral from someone I wasn't expecting one from, I would hope that the person being referred was expecting the referral.

2. Introductions

You have two people you want to introduce, great!

As I see it, you have three options: email, phone or in-person introduction. Generally, I prefer to give and receive email introductions (less for you to coordinate). So, that's what we're going to focus on.

Now, how do you introduce someone? Well, if you're not sure how someone would like to be introduced or described – ask them! What you say, or write, is a first impression for the other person. So, if you're not sure, draft something and ask them what they'd change or word differently.

There isn't a much better email introduction than [this one](#) on Forbes.com. The following example uses that script.

{Person One},

The other day you mentioned *{problem}*.

I'd like to introduce you to *{Person Two}*. She helps people *{Person Two's ideal client}*. Based on this, I feel like it would benefit you both to have a conversation.

{Person Two}, I'd like to introduce you to *{Person One}*. She is a *{describe her business and why she's an ideal client}*.

{Person ?}, I'll let you take the lead on this.

I hope this introduction leads to a great conversation in the near future.
Keep me posted!

Again, this is only an example. Personalize it! Share why this is a great connection for them both.

3. **Going the extra mile**

You might have noticed that earlier I mentioned to *mentally* see if you know anyone who might be a good fit. And that's a great approach for someone you've only met briefly (those occasions where you're out networking and you meet someone new and have *maybe* five minutes with them).

However, if you're having coffee with them and are really getting a good feel for who they - help, and you think you know one or two people who might be a good referral or connection, then go the extra mile. This means going through your contact list and identifying the possible referrals or connections.

Yes, this takes a few more minutes of time, however *everyone* benefits!

2. Asking for a Referral

Always ask for referrals!

Asking for referrals might seem awkward at first because we don't want to seem pushy or needy or *{insert your reason here}*. However, that has more to do with how you perceive asking for a referral than anything else.

1. Awkward?

Even the word awkward is awkward. If you feel awkward asking for referrals, ask yourself these questions:

- a. What goes through your head when you're asking for a referral (or when you think about it)?
- b. What is your experience with someone asking for a referral?
- c. What energy level are you at when you ask for a referral?
- d. What would the experience look like even one energy level higher?
- e. How do you want asking for a referral to feel?
- f. What can you do to support asking for a referral to feel that way?

One more thing, when you're able to make a referral, how does that make you feel? Pretty great right?! Like you were just able to do someone a favor and your reward was knowing that everyone benefited from the exchange, right?

So, think of not asking for a referral as depriving the person you're talking to from that experience. Everyone wins when a great referral occurs; give yourself every opportunity to be part of that process!

2. What to say

This doesn't have to be difficult, truly. Generally, you want to ask for a referral when you're having a coffee or phone meeting with someone and sharing a bit about your business. At the end, just say "if you know anyone that fits that description just let me know!" or "if you know anyone that would benefit from this, just let me know!"

When they know of someone, ask them to do an email introduction. Make it easy for them! Email them how you want to be introduced and if you want, include that [Forbes article](#).

Remember, they probably haven't thought about the best way to do an email introduction, so make it easy on them. And, in this case, the introduction is a little cold (or not qualified), the person you're being introduced to might not be expecting the introduction. Assume they are interested until they tell you differently 😊

3. Receiving a Referral

Woohoo! You've received a referral! Now what?

All your preparing has paid off and you've received an introduction or someone calls you because they heard about you from a mutual friend or acquaintance.

Your new potential client goes into your potential client system (that will be covered in the next worksheet).

Now, how do you thank the person referred you (the mutual friend or acquaintance)?

1. **Are you a business that pays referral fees?**

There are many businesses where it is customary to pay the referrer a percentage of the business generated from them. If you're not sure if you fall into this category or not, you probably don't. Generally, someone with a business that falls into this category is *very* aware of this process and there is already a detailed system in place for receiving referrals.

2. **How will you acknowledge the referral?**

Will you send an email thanking them, a hand written note or a gift?

3. **When a referral becomes a client, how do you acknowledge or thank the referrer?**

Again, will you send them an email thanking them, a handwritten note, a gift, something else or some combination?

Take the time to think about how you want to acknowledge and thank someone for a referral. When you put this into place *prior* to receiving a referral, it eliminates feeling unsure about what to do next and how to approach it. And it ensures that you're treating every referral the same.