TEN STEPS TO GETTING GREAT

REFERRALS

DEFINITIONS

RECOMMENDATION

vs.

REFERRAL

Two Types

TYPE 1 REFERRAL

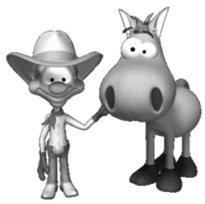
WHAT YOU DREAM OF

"John Doe gave me your name. I need you to help me build a bridge to England."

- No selling
- No marketing cost / time
- Sole source
- Presold
- Opportunity to create a new client / client representative for life ($5,000,000 - $25,000,000 or more)

NO BUTS ABOUT IT! DON'T LOOK A GIFT HORSE IN THE MOUTH

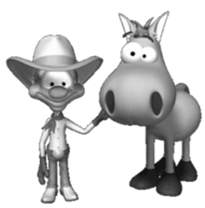
Not All Horses Are Good Horses



Equine Infectious Anemia

COGGINS TEST

a.k.a., GO / NO GO DECISION



TYPE 2 REFERRAL

SOME WORK REQUIRED
(NOT A LOT!
WORKS BETTER THAN DREAMS!)

- **A little selling (warm call)**
- **A little marketing cost / time**
- **QBS (let's hope)**
- **Presold**
- **Opportunity to create a new client / client representative for life ($5,000,000 - $25,000,000 or more)**

WHO WANTS CLIENTS THAT BID EVERY PROJECT?

THEY DON'T APPRECIATE THE VARIABILITY OF SERVICE SCOPES AND ITS IMPACT ON RISK. THEY DON'T APPRECIATE THE VALUE OF QUALITY. THEY DON'T UNDERSTAND PROFESSIONALISM.

- A little selling (warm call)
- A little marketing cost / time
- QBS (let's hope)
- Favorably inclined
- Opportunity to create a new client / client representative for life ($5,000,000 - $25,000,000
  or more)

STEP ONE

IDENTIFY THE TYPES OF PROJECTS AND CLIENTS YOU DO AND DON'T WANT

Ask yourself, why do we
want clients like that?
The types/size of projects they
commission? Not litigious?
What about the attitudes of their
representatives?
Do they value quality and seek its
economy long-term?
Do they value low first cost
above almost all else?
Does attitude vary from rep to rep?

You'll wind up
creating your ideal
client and client
representatives,
which will give you
a metric to evaluate
those who show
interest.

STEP
TWO

IDENTIFY THE ACTUAL ORGANIZATIONS YOU WANT AS CLIENTS

Has your firm or office identified the top 10, or 25, or 50 organizations you'd like to convert to clients of your firm rather than your competitors'?

STEP THREE

RESEARCH

Depending on how many comprise your selling group or "sales force," for each of your top one, two, or three prospective clients:

- Learn who in your firm already knows people there.
- Learn if you and others in your firm have a family member, friend, or neighbor who works there or knows someone who does.
- Then ask others, such as…

Subcontractors
Other Consultants
Association Peers
Association Executives
Accountant, Lawyer, Banker
Commercial Vendors
College Friends
Marketing Circle

You can then develop a simple list identifying who knows whom within the prospective-client organization and, with some additional research via phone, e-mail, and Internet, what their job titles and responsibilities are.

NEXT

Not necessarily in terms of time; knowing what you need to know, you can develop a plan to optimize team performance.

You need to identify those in each organization who influence and make the decisions about which firms receive their commissions.

Some you may already
know through one activity
or another.

Some you may already
know through one activity
or another.
Some may already be on your list.
Some of those on your list –
probably more than just a
few – may know, report to,
or even supervise the
people you want to meet with.

STEP FOUR

MORE RESEARCH

LEARN ABOUT THEIR CURRENT PROVIDERS. YOU MAY PREFER TO NOT COMPETE.

STEP FIVE

GETTING IN

The people who allow you
to mention their name so you can
get your foot in the door –
who give you a Type 2 Referral –
are making things easy for you.
The person you're trying to
speak with will not likely turn down
your reasonable request for a
little time, because doing
so would be insulting to
the person who referred you.

So, once you have your foot
in the door, what are you
going to ask for?

Time to make a sales pitch?

That would be like saying, "We're a lot better than that other firm you've stupidly been happy with for the last 10 years.

Before you meet, you and your teammates need to learn as much as you can about the prospective-client organization and the industry it's part of. In that way, you can develop intelligent questions about capabilities and services you and your firm could offer to meet the industry's emerging needs.

Having done that, when you speak with the prospective-client representative to set up the meeting, you can say:

"We're planning to develop new services to meet the emerging needs of your industry. Everyone I've asked says you're the person to speak with, so I'd like to do just that.

So you make a reservation, then pick the person up and go to the restaurant and ask your questions.
If it's against policy for you to buy lunch for the person, figure out something else; e.g., just an office appointment.

Experience suggests that, if you ask good questions, you will get valuable answers.
You will make a good impression and, if representatives of other firms have not done this, you may be asked to consider submitting a proposal. You could also ask,

"I wouldn't want to interfere in your relationship with Whatsis and Whatsis; we've worked with them. It's a solid firm. Would you have any suggestions about others you know who may need our services, like…."

That's demonstrating a highly professional, peer-to-peer respect, which is just what you need to gain even more referrals.

(This is actually part of an FOPP research assignment and almost all persons interviewed have been gracious, and many have invited the FOPP participant to speak with someone in the organization about future commissions.)

WHY

**would the prospective-
client representative be so kind?**

BECAUSE,

**contrary to what
you've been told,
FLATTERY
WILL GET
YOU ALMOST
EVERYWHERE.**

**Even if someone is the
most knowledgeable person
about one subject or another,
saying so is merited flattery.
MOST PEOPLE LIKE THAT!**

After you meet, send the contact a handwritten thank-you note and send the individual relevant material on an ongoing basis, assuming you get to know a bit about the person's passions. (Staying in touch is important.)

**"BUT THAT'S NOT ME.
I DON'T WANT TO SELL BECAUSE
I DON'T KNOW HOW. BESIDES,
IT'S NOT MY NATURE."**

NOT TRUE

How’d you get your job?
How did you get your spouse
to say yes
or at least get a date or two?
Low bid?

How’d you get your job?
How did you get your spouse
to say yes
or at least get a date or two?
You put yourself in the right place
at the right time and just acted
like who you actually are.

You can often be in the
right place at the right time
by becoming active in a trade or
professional or community
organization in which
representatives of a target client
are involved.
Join a committee!
Which one?

STEP SIX

TRAINING TO DEVELOP A HABIT

When a client representative asks, "So how are things?"

Your automatic response should be something along the lines of…

“Well, I’ve been tasked with bringing in some new business. You know anyone out there who I should call on?”

Rehearse with a teammate every morning for ten minutes or so, and here and there throughout the workday, and in just a few weeks you will turn yourself into a highly effective referral-getting machine. Only once for each client representative, of course.

STEP SEVEN

TAKE A
CLIENT REPRESENTATIVE
TO LUNCH
(You can rehearse this one, too.)

Take two or three of your favorite client representatives to lunch, one at a time. Tell them beforehand,
"I need to pick your brains."
Then, at lunch, use words that will have the same effect as these…

"I really enjoy our relationship. We get things done together. It's very satisfying. I wish I could say that about all the client reps I deal with, but I can't. Tell me, are there other client reps out there like you who could use my services?"
Flattering. True.

You will get names, and – chances are – the individuals you're referred to will have many of the same character traits you admire in the client rep who gave you the names.

STEP EIGHT

KEEP THE REFERRAL SOURCE INFORMED

Good morning, Jane. Thanks so much for giving me John's name. Just to let you know, I have a lunch meeting with him next Wednesday.

My meeting with John went really well, Jane. He had some very nice things to say about you. (I did, too!) He wants me to meet with a couple of others on his team in two weeks. Exciting! I'll keep you posted.

STEP NINE

REWARD THE REFERRAL SOURCE WHEN THE REFERRALS RESULTS IN A COMMISSION DON'T BE CHEAP.

Common rewards are:

A thank-you call.
A dinner.
Tickets to a game.
A bottle of wine.

CHEAP!

HOW MUCH WOULD YOUR FIRM PAY FOR AN ADVERTISEMENT THAT WAS GUARANTEED TO BRING IN NEW BUSINESS OR YOU PAY NOTHING AT ALL?
$1,000?
$2,500?
More?

Get a nice gift that plays to the person's passions, showing you appreciate the person as an individual.

The kind of gift that evokes an “Oh my gosh: You shouldn’t have!” And you know it’s not coming back.

The kind of gift that makes the referral source think, “I’m gonna’ find some more clients for this person!”

The kind of gift that makes the referral source think, “I’m gonna’ find some more clients for this person!”
Espec*ially* Typ*e* 1 Referrals!

And if the person
cannot accept gifts?

STEP
TEN

JUST DO IT!
And you, too, will become
a selling machine!

Questions?

Just e-mail
john@bachner.com

IT'S NOT TOO LATE!

We still have space in

FUNDAMENTALS OF PROFESSIONAL PRACTICE
CLASS 23

Call or e-Mail Now!