



# activating your promoters

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HOW SAVVY SELLER/DOERS CREATE OPPORTUNITIES



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You did the hard part!





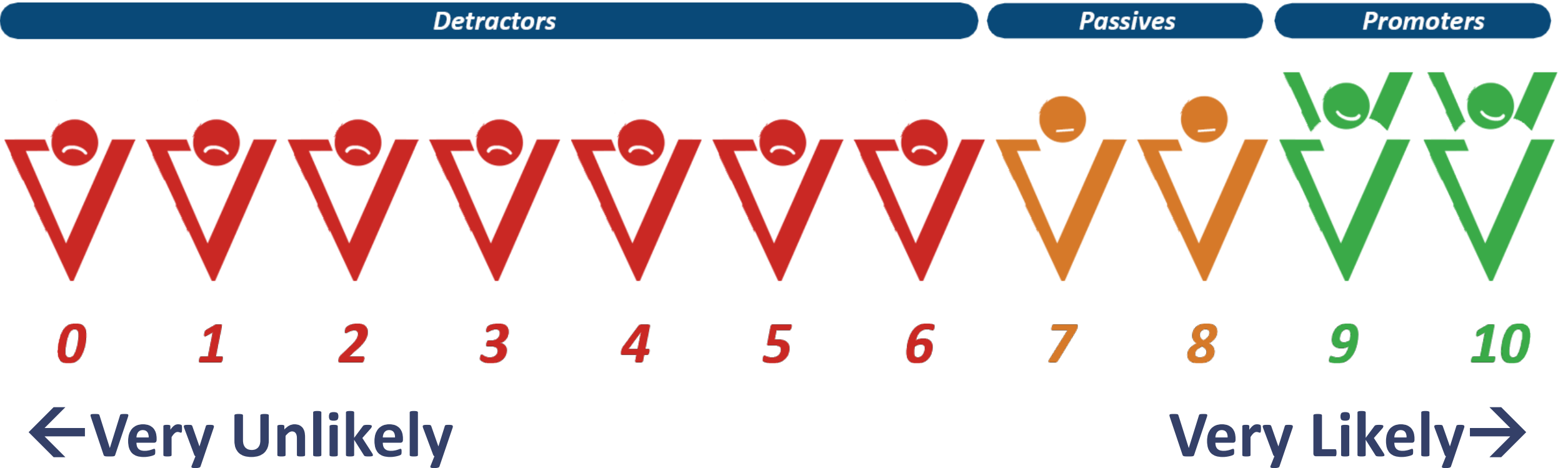
**WE MAKE  
IT EASY**

# Identifying Promoters

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CREATING A PROMOTER ISN'T ENOUGH – YOU HAVE TO FIND THEM!

# How likely are you to recommend us to a colleague or peer?



# THE VALUE OF A PROMOTER

Stay Longer

Buy More Services

Cost Less to Serve

ID Ways to Reduce  
Costs

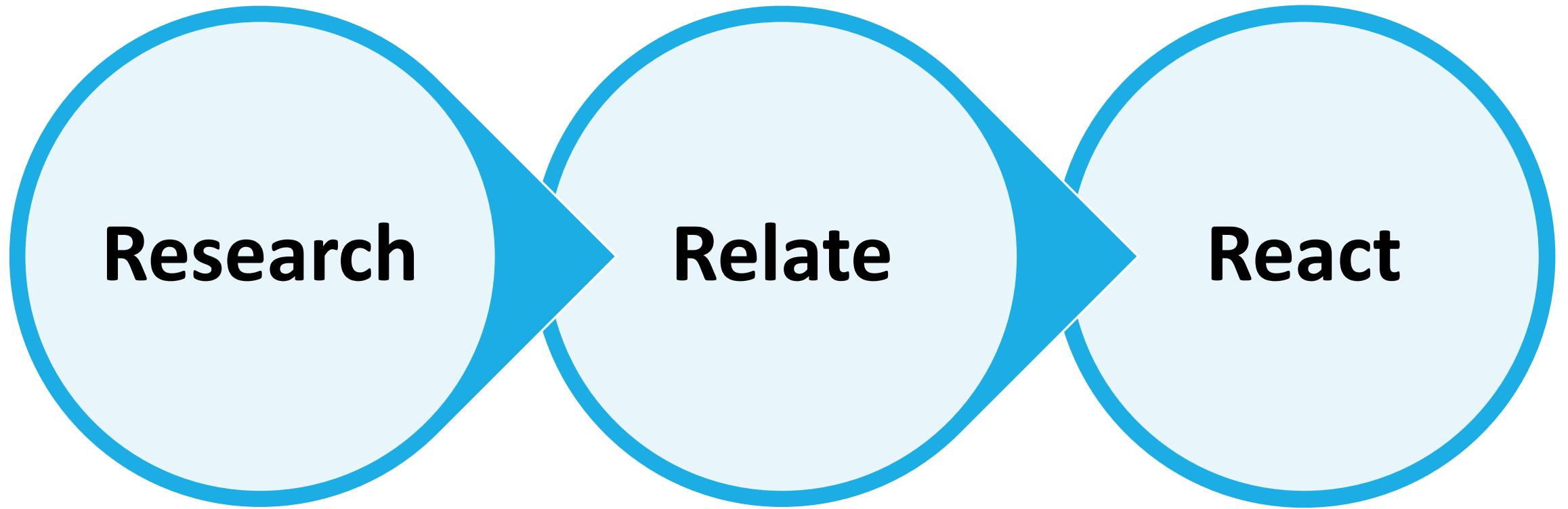
Bring Us New Clients

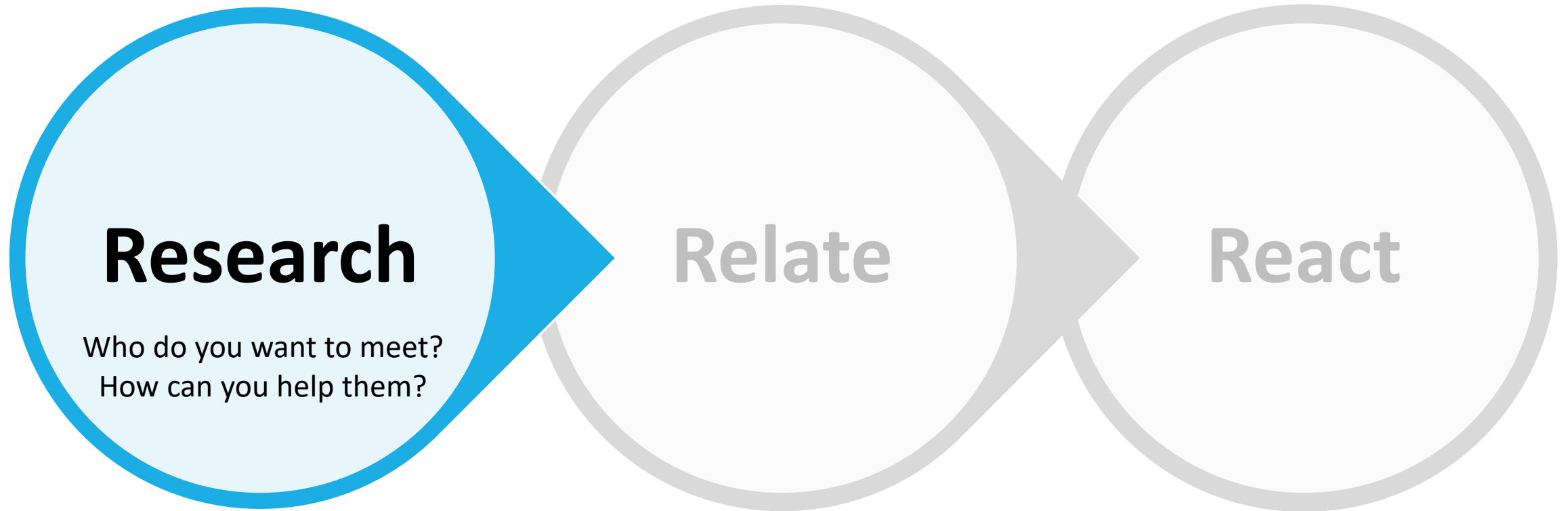
Happy Clients =  
Happy PM's

# Activating Promoters

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THREE STEPS TO GETTING THE REFERRALS YOU WANT



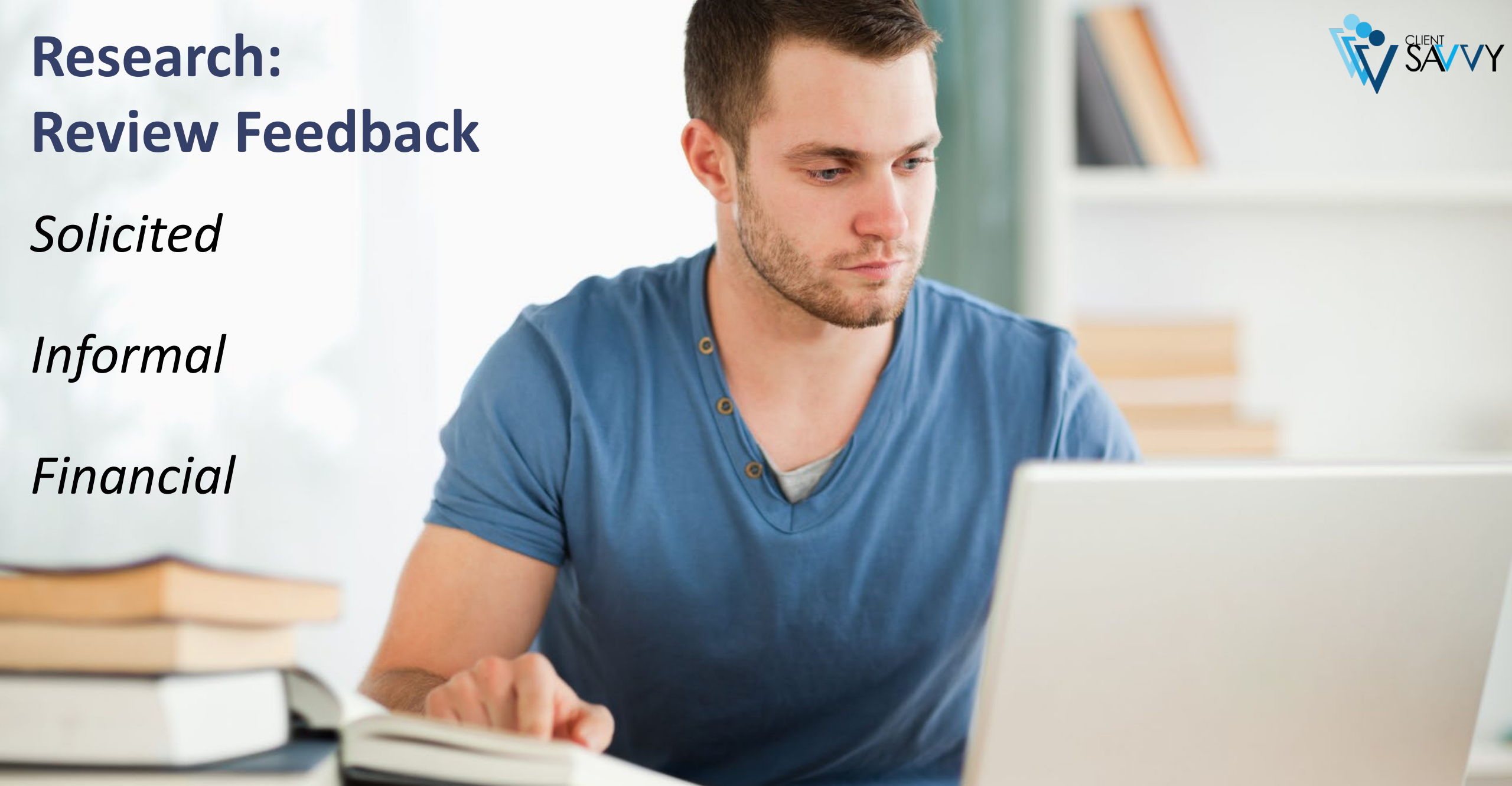


# Research: Review Feedback

*Solicited*

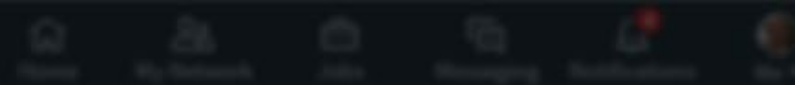
*Informal*

*Financial*



# Research: Peer Review





Join a 2025 Board Today - Work on your business with CEOs, executives & owners just like you. | Ad



Robb Flunt

## Robb's Connections



Shared **All**



**Neil Crist** · 2nd

Product Leader, Entrepreneur, Angel Investor, Advisor



**Stephen Malik** · 2nd

Chairman and Owner at North Carolina FC



**Loren Shumate** · 2nd

Director of Segment and Channel Marketing



**Michael Reilly** · 2nd

Public Relations and Marketing Consultant, Reilly Communications



**Heather Rodgers** · 2nd

Principal, Product & Client Relations, Reilly Communications

### Highlights



**66 Mutual Connections**

You and Robb both know Bill Flunt, Christopher, and 63 others

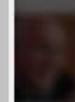
### Robb's Articles & Activity

### Work and Personal Info

Work Profile, Website, Phone, Email, Twitter, Birthday

See more

### You May Be Interested In



**Join a 2025 Board Today**

Work on your business with CEOs, executives & owners just like you.



**Need Working Capital?**

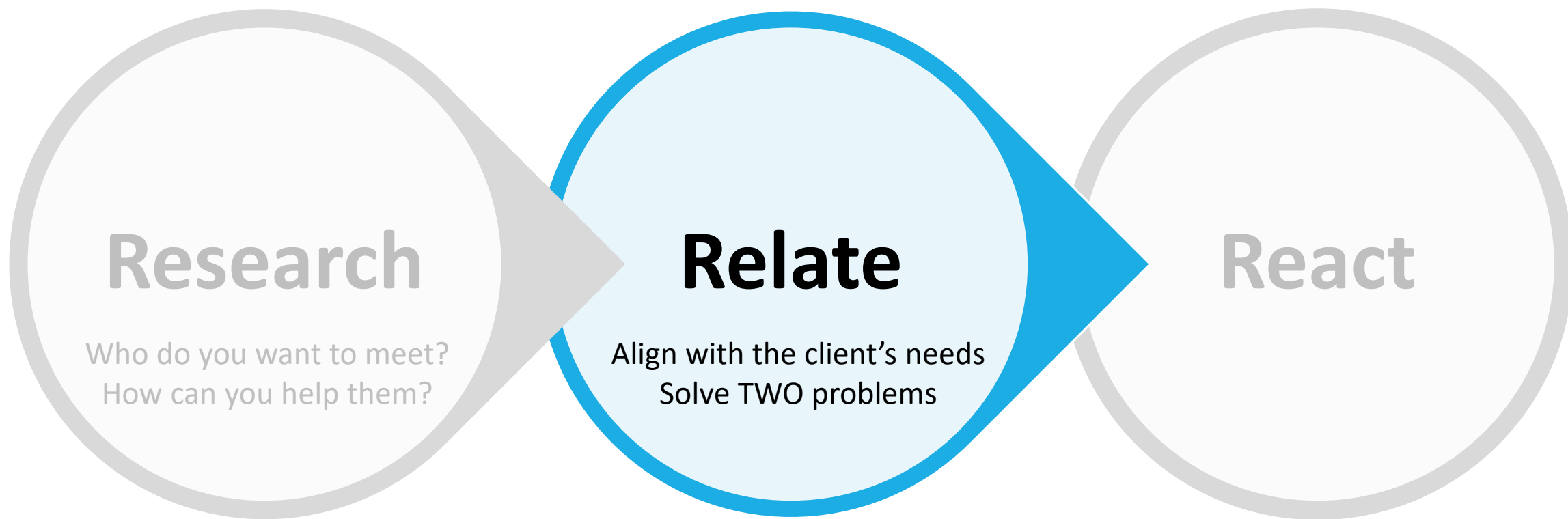
Secure \$50k - \$500k in Cash - Offer Today. Speedy - A Better Way To Borrow



**Learn & Sell Digital Training**

So digital is growing so fast, it's a great time to learn the skills, and create training





# Stage the Meeting

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Show Appreciation



Express Value to Client



Generate Hope



Offer Enjoyment

## Subject: Project Success Conversation Request



Dear Client,

Thank you for the opportunity to work with you on [project name.] My team and I **have enjoyed the experience**, and we're glad to hear from your feedback that you've found success in the project as well.

Appreciation

I would like to schedule a time to **talk about your success**, and what things we are doing specifically that help. It's critical to us that we don't take success for granted, and that we carefully examine how to continue achieving for you in our quest to always improve.

Value

We heard you say that [something positive from their feedback] is **making an impact**, and that's just one area we can investigate.

Hope

Could we **perhaps meet for lunch** on [date options], or find a time in your office or via phone to connect?

Enjoyment

Thank you very much for helping us be our best,

[Signature]

# Client Conversation Guide

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Can you tell me more about  
(what worked so well)?



What about your situation  
made this outcome good?



Who else in your organization  
was affected by this?



Discuss how you can repeat this  
performance and confirm.



Consider probing further:



How else can we help you and your  
organization?



Can you tell me more about that?



What would an ideal (your type of  
firm) do that no one does now?



## Create a Plan

Let the client see your approach to increasing her success

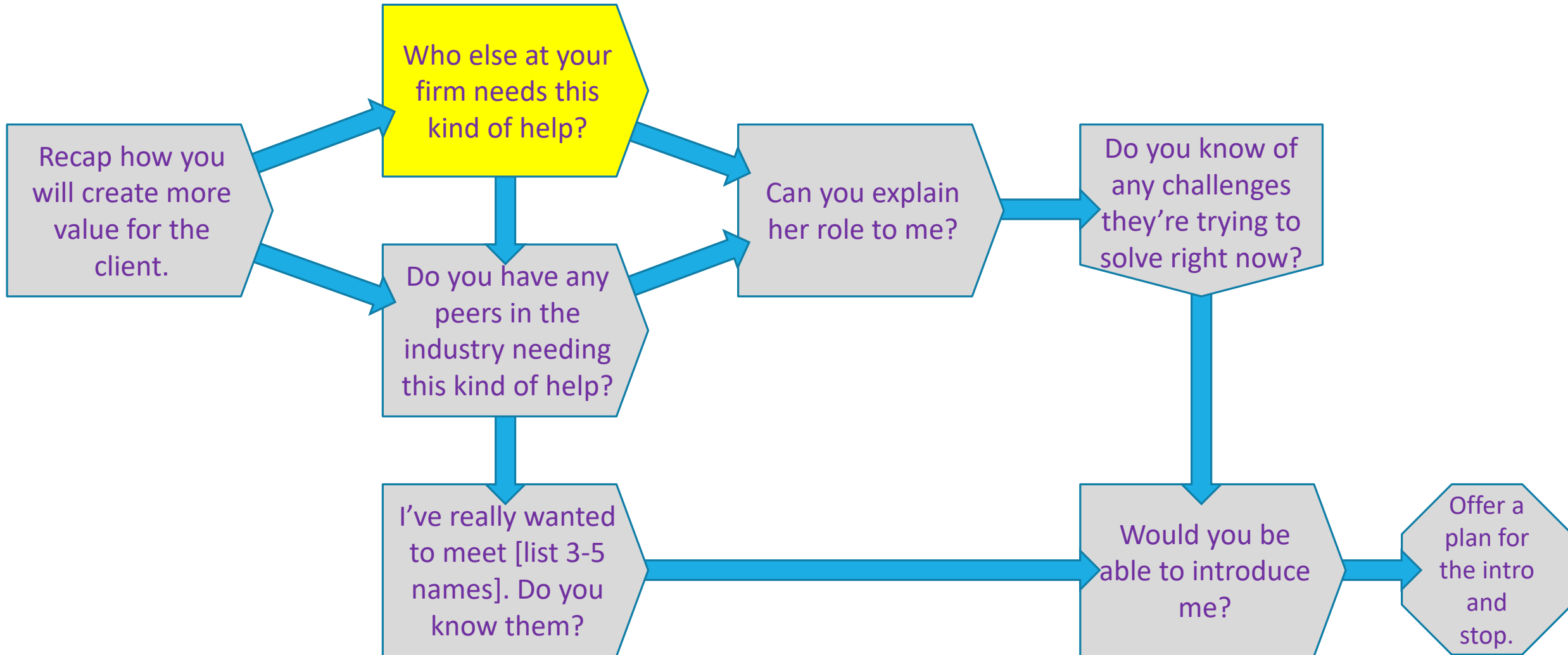
# Helping Two Times

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HELP THE CLIENT, THEN HELP THE CLIENT HELP A FRIEND



# Referral Conversation Guide





# Research

Who do you want to meet?  
How can you help them?

# Relate

Align with the client's needs  
Solve TWO problems

# React

Show your care  
Demonstrate your help

# Recap the Meeting (in writing)

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Begin with Agreements to Improve Value



Provide Status on Action Items



List Referrals and Method of Introduction



End with “I look forward to your introductions, and reporting back how we’ve been able to help them too.”

# Referral Conversation Guide

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Do NOT sell.



What do you know about the project I helped [colleague] on?



How are your projects similar?  
How are they different?



We helped [colleague] with this problem. Is that one you share?



What other challenges have you faced on your projects?



Share stories of how others (not you) have solved similar problems.



Offer ideas, but not direct help (don't sell).



Done well, the prospect will ask you to help!

*“I met with [referral] today – it was a great meeting. Thank you for the introduction. I discovered she’s dealing with [challenge]. I think we might be able to help by [suggestion]. I wanted to get your thoughts about that.”*



## Ask Your Client for Advice

Keep the client engaged in helping his colleague – you’re in this together!

# THE VALUE OF ENGAGEMENT

Invested in Success  
Together

Encourages Talk  
Between Them

Shows You Value His  
Colleagues

Shows You Value  
Clients' Insights

Proves You Are  
Focused on Help

Makes Your Client  
Look & Feel Good!

# Helping Two Times

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HELP THE CLIENT, THEN HELP THE CLIENT HELP A FRIEND



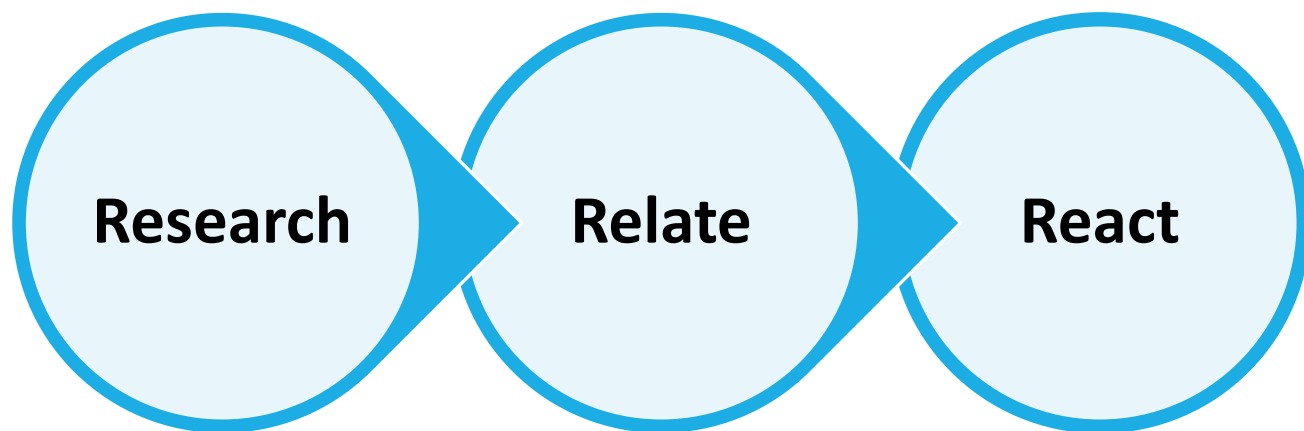
# Helping Ten Times

PROVE THIS ONCE, REPEAT IT OVER AND OVER



# Tell the Story!





*“Who else can I help like I’ve helped you?”*

**Questions?**  
**Ideas?**  
**Success Stories?**





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