

You've done the hard part! You found a potential client, you earned their trust and their business, and you have or are delivering a spectacular project. You've asked for feedback, and the client has said emphatically: "Yes, I am very likely to recommend you to a friend or colleague!"

That's great! Feel good – these relationships are hard to nurture and develop. Congratulations.

But, just because a client said he is *likely* to recommend you, does he know to whom or how to do so (especially if you provide a rather niche service)?

Your job is to make it *easy* for your promoter client to activate on his sentiment. Done right, not only will you get the referral you so eagerly want, but you'll help your client feel great about the interaction, and even further deepen the relationship.

Activating a promoter includes three key phases: **Research, Relate, and React**. Research includes the work required to prepare for a conversation with the promoter. Relate includes scheduling and meeting with your promoter. React includes the work you do after the meeting to capitalize on the conversation.

Below, find a check-list of steps within each phase, to help you plan and track your efforts to activate each promoter.

### Research

- ❑ **Review all feedback given by the client for the last year or two.** Look at their comments and trends – have you had a consistent level of "promoter" sentiment, or is this a newer level of engagement? Specifically look for any comments left indicating WHY the client feels so well cared for. Make a note, and bring those with you to the client meeting.
- ❑ **Discuss what other team members know about the client,** including potential success stories. You don't need to know everything, but a few quick conversations with your colleagues may unveil helpful information. Ask who else the client knows or might know that you'd like to be introduced to.
- ❑ **Leverage LinkedIn and other online tools.** One key to asking for a great referral is to suggest 3-5 names of

people you'd like to know better that the client is already connected to. LinkedIn allows you to see who the client might connect you with.

In summary, come prepared with a couple of successes recognized by the client and two connections you'd like to make.

### Relate

An effective referral conversation usually happens live: face to face preferred, or via telephone if not. Surprising a client with a phone call may not always be appropriate. Use your judgment situationally, but I suggest typically inviting the client to a meeting to discuss project success. Perhaps use a message like this:

#### 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.

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.

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

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

Thank you very much for helping us be our best,

[Signature]

Whatever form of meeting agreed upon, come prepared with the research you've done. Start the conversation with cordial talk, inquiring about the client's interests and activities. Then, move the client toward the success conversation. Provide any prompts (discovered successes from their feedback or internal conversations). Good questions include:

1. *Can you tell me more about this situation?*
2. *What about your situation made this outcome work well?*
3. *Who else in your organization was affected by this? How?*
4. *Discuss how you can repeat this performance, confirm the plan meets the client's needs.*
5. *Consider asking additional questions to probe into opportunities to improve even further.*
6. *How else can we help you and your organization?*

7. *Can you tell me more about that?*
8. *What would a perfect [your type of firm] do that no one else is doing right now?*

**Develop a plan to execute on any ideas, repeat it back to the client and gain confirmation.**

Now that you've celebrated success (and perhaps reminded the client of what great work you did), and now that you've clearly put the client's needs first, and found additional ways to help, you are ready to make your requests:

1. *Is there anyone else in your organization who needs this help, perhaps on a different project?*
2. *If yes, who is it? What are they trying to solve? Would you be able to introduce us? If so, gain a commitment to the introduction.*
3. *Thank the client!*



4. *Do you have any colleagues outside your organization we might help like we've helped you? If yes, take the referral, ask for the introduction, and stop for now. If the client thinks too hard, or seems to struggle to make a connection, offer a few suggestions. "You know, I've been really wanting to get connected to [name 1, 2, and 3]. Do you know them? If yes, would you be willing to facilitate an introduction?"*

5. *Thank the client!*

Notice the emphasis on the phrase "we might help like we've helped you" – this wording gives the client a compelling reason to make the introduction. By introducing you, the client is actually helping his friend. You want to help the client see that an introduction is to his friend's benefit. By keeping the focus on the client and his friend, rather than on your firm, you aren't even asking for a favor. You're simply offering help.

If you've done this well, and if you're getting a good vibe and cooperation from the client, you may even make a bolder ask. You may request reviewing the client's LinkedIn contacts list together. You might be surprised at how often clients are willing, and at how many contacts they will "remember" could use your help. Tread carefully, but take some risks - especially if you've already had a referral conversation before, and successfully helped one client's colleague with a project. The client should be interested in being the connector between his friend's need and your help.

**Summarize the meeting.** Recap what's working well, restate any agreements to continued help. Recap who the client agreed to introduce you to and restate any specific problems the client indicated you might help with. Thank the client again, and ask once more if you can assist in any other ways.

### React

**Shortly after the meeting, summarize all findings in an email.** Top-load the message with agreements about how to continue/improve help to the client and list any of your action items. End the message with the list of referrals agreed to, and a closing statement like "I look forward to being introduced to your colleagues,

and reporting back how we've been able to help them as well."

**Confirm the client makes good on the commitment to introduce.** Be careful not to go into "sales" mode. Invite the referral to a meeting, lunch, drinks, etc. – and just seek to understand more about them and their organization. Ask what the referral knows about the project you helped your client with (let *him* tell you what he knows). Fill in gaps as needed. Lead that into a focus on what similar challenges he's facing, and offer ideas, rather than direct help. If the referral connection is strong, the potential new client should ask you to help him, before you even offer the help.

**Report back to your client.** "I met with [referral] today – it was a great meeting. Thanks for the introduction. I discovered she's dealing with [name a challenge]. I think we might be able to help by [offer suggestion]. I wanted to get your thoughts about that."

By reporting back to the client, you accomplish a few things:

1. *You engage the client in the success of his colleague*
2. *You seed potential conversations between the client and his colleague (to assure your name comes up)*
3. *You show the client you value his colleague*
4. *You show the client you value his insights*

When you activate a promoter, you'll not only find a few new potential business opportunities, but you'll deeply engage your client in mutual success. You'll establish a protocol for how to make referrals happen. You'll develop trust that you won't abuse a referral with sales pressure. You'll also set a precedent with the new client that you appreciate referrals and treat them well – leading to another generation of promoters and referrers. Finally, you'll earn permission (and perhaps enthusiasm) to have more referral conversations with the client in the future.

When you find success with these conversations, share it with your colleagues to help inspire them to do the same. The impact to your business will be swift and felt by all.