



7 STEPS TO ASKING FOR A CLIENT REFERRAL

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Recommendations and referrals are the lifeblood of any professional services business but there's something that can make us decidedly embarrassed about asking for them. Perhaps we're anxious about coming across as pushy or desperate or too 'salesy'.

Perhaps we're worried that they'll think we'll become too busy to look after their work. Perhaps it's deep-seated fear of rejection.

Whatever it is, now's the time to put shame aside and start asking clients to recommend us for work. Because, done properly, there's no reason asking for referrals needs to be uncomfortable in the slightest.

Here's how you do it.

1. EARN YOUR REFERRAL

One of the most important things to remember about asking for referrals is you need to earn them. Don't ask for more work the moment you start billing. You need runs on the board.

You also need to know that your contact is happy with the work you've been doing. So hold off until you've completed an engagement or an important milestone. Then, within 30 days, ask them for feedback on your service and the overall outcome of the matter.

2. PREPARE FOR YOUR CONVERSATION

Before you make any request of a contact be clear about your positioning. You'd probably like new clients that share some attributes of clients you already enjoy working with.

Ask yourself who is your ideal client? Which industry do they work in? What kind of personality do they have and what's their business style?

You can then be a little more specific about who you'd like to meet. Is it people with a particular title or area of responsibility, such as in-house counsel or 'the person in charge of facilities', etc?

Use these insights to develop targeted positioning about the work, sectors or solutions that your contact will relate to and remember. For example: "I really enjoy helping HR Directors that work with fast growing businesses in the Fin-Tech sector."

3. BE READY TO SHARE YOUR OWN BUSINESS OBJECTIVES

A high-trust approach to referral building is to share your business objectives with contacts. Let them know you are building a practice in a specific area, let them know your business relies on referrals and let them know how you work with referral sources.

4. NOW IT'S TIME TO TALK

Now you've prepared it's time to talk. When you do get face to face, ask your clients if they know someone who faces (and seems willing to acknowledge) a similar business problem to the ones you want to help with.

Your clients usually know this kind of information about their circle of business friends, or can discern it with some confidence.

Let your clients know that you'd be happy to help their friend/colleague/contact and that you will personally ensure you will do the very best for them.

5. MAKE IT EASY FOR THEM

Ask your source if it's OK to contact their friend/colleague/contact next week and to drop their name in order to get past any reservation. Or provide them with draft contents for an email introduction.

6. AND WHEN YOU GET A REFERRAL

Thank your referral source. Straightaway. Don't wait to see if the referral converts to work. While we may be limited in our ability to reciprocate referrals, one simple way to show your gratitude is simply to say, "Thank you for introducing me to..." with a personal and handwritten note.

A good move for firms is to have some appreciation gifts on hand.

A bad move is to tie-up access to such gifts in red tape. Even worse is to make this a 'Partners Only' privilege.

7. AFTER YOU'VE BEEN INTRODUCED...

When you meet with the person you've been referred to, be prepared to offer something extra in exchange for their time. For example, be willing to share some ideas/IP in your first meeting. After all, you want them to thank the person who introduced you.

And make sure you call your referral source, say 30 days after their introduction, to keep them up to date with how the relationship is progressing.

AND FINALLY...

Referral relationships usually work best when they're not all one way. So keep thinking about your contacts' businesses and whether there's anyone in your network you could introduce to them - even if you don't necessarily work that closely with them.

For example, if you're hosting a firm function or seminar, see if there's anyone attending that they may want to meet and be the one who facilitates the introduction.

WANT MORE?

And there you have it. The ground rules for referrals. Follow these and I promise you'll have a healthier and more appreciative network of referrers. And that should lead to a healthier practice too.

So, if you need help analysing or growing your own network of referrers [get in touch](#).

FURTHER READING

How to Repay a Referrer When you can't Refer Back



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