

Script: Referrals 1.0

The Home Office is providing training references, scripts, and follow-up activities ideas to help you pick up the phone with confidence! *Being prepared results in confident calls!*

Target audience: ALL (Prospects, Lapsed, New Accounts and Inforce Accounts)

Review the training regarding referrals on PROPR:

Home > Training > Training Curriculum > Opening New Accounts > Prospecting > [Referrals](#)



Importance of a referrals and methods

A referral approach should be the fastest and easiest means of gaining that opportunity! From individual consultants such as Zig Ziglar to magazine articles and books published each year, referrals are considered an important and productive activity for successful sales people. As a representative of any product or service, a sales person engages in personal selling. Personal selling requires gaining the attention of an individual (prospect) to tell the story of the product or organization you represent. There are two methods of referrals, center of influence and endless chain.

Center of Influence Method

As a member of your community, you are in contact and have experiences each day with others. Your reputation (integrity, trust, and character) within your community should be an asset and something influential members of the community might feel compelled to direct business to you. Who are influential members of your community? These are individuals who are sought by others to learn their opinion on decisions such as business leaders, faith based leaders, medical providers. You want to be the first person on their mind if someone discusses benefit issues with them.

Endless Chain Method

As every prospect you meet with to recommend someone else for you to contact. Consider setting a goal of asking each person you meet with to provide you with the names of two individuals at different organization for you to contact.

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Good Referral Building Habits:

Don't feel sheepish about asking for referrals; there's nothing pushy or smarmy about it. People won't give you referrals unless you deserve them. In fact, getting a referral is the highest compliment you can receive. Let your customers know you prize referrals, which you'll earn by providing excellent quality products and services.

- Do not “wonder” or “hope” someone can refer another organization. Eliminate those words when asking for referrals. Use every client meeting as an opportunity to collect referrals. To keep yourself on track, jot a reminder down in your meeting preparation notes. Make it one of your standard talking points.
- Set a weekly goal for yourself. Keep track of the number of referrals you ask for each day. You don't need to limit your requests to clients; you can also ask business associates, acquaintances and prospects.
- Always be specific when asking for a referral. Looking for high net worth individuals? Say so. Interested in midsize companies? Let them know. If you don't tell your contacts who your target customer is, you'll waste time pursuing leads you can't use.

SOURCE: <http://www.entrepreneur.com/article/177640>

Scripts

- **Setting the Expectation with a potential Customer:**

(Decision Maker's Name), if I do a great job for you and I will, will you agree to give me X number of referrals?

- **Responding to a thank you note or comment in a post-enrollment meeting:**

(Decision Maker's Name), I am so pleased you are happy with my work. Do you know anyone else who can benefit from my services?

- **Inforce Account:**

(Decision Maker's Name), I have been representing Colonial Life and working with you to provide your employees benefits since X year. I have a favor to ask you, but only if you're comfortable with it.

It has been my experience this past year that many business owners / human resource professionals have been speak about how to navigate all the changes with health care reform and other changes to their benefits with friends, relatives, and others at work .

That's great. During those conversations, has anyone you're talking to mentioned that they are also thinking about changing their benefits?

When that happens, I would really appreciate it if you would tell the person about me and how we have worked together now for X years. With their permission, I'd really appreciate you providing me their contact information. Are you comfortable doing that?

That's great, I really appreciate it.

Following up

- Send a thank you note to whoever provided the referral. Best to include a comment about how the call went with referred group.
- If you identify a “Center of Influence,” keep that person up-to-date on your work. Ask them if they would

Be prepared to respond to the following:

- I don't really have anyone in mind.
 - Ask about vendors or business partners that business or organization works with or services.