Script: Referral Approaches 2.0

Why not? You miss 100% of the shots you don't take! The Home Office is providing training references, scripts, and follow-up activities ideas to help you pick up the phone with confidence!

Target audience: Prospective Accounts, Inforce Accounts, reassigned or inactive, any size

Review the training regarding referrals on PROPR:

Home > Training > Training Curriculum > Opening New Accounts > Prospecting > Referrals

Referrals 2.0 provides three methods. Consider setting the stage with an account you'd like to ask for a referral by conducting a quality check-in with the account, then visiting them in-person to ask.

"VIPS" Approach
(Values, Importance, Permission, Suggestion)

Value

Discuss the *value* – "Of all the services we discussed, what do you feel is most valuable to you or your employees?"

Importance

Treat the request with *importance* –

1. Create enough time. Schedule a meeting to discuss their experience and referral opportunities.
2. If you met the account through a referral, let them know.
3. If there's somebody you know that would benefit, make it a statement, not a question:
   "We appreciate clients sharing the positive benefit they had with us."

Permission

Gain *permission* to discuss. This reduces objections.

"Can we discuss for a minute who you know that would benefit from what we do?

Suggest

Suggest names and categories. Help paint the picture. Answers to any of these questions can lead you to use the **Business Card Approach** *(See page two)*.

a) "In this area, there are several small businesses."
b) "Do you know others in your industry?"
c) "I know you're active in your association. Can we start there?"
d) "What vendors or suppliers does your company work with?"
e) "Do you have family or friends who also own a business? Would it be okay if I mentioned your name?"

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Prospect Checklist

- ### Preparation:
  - Pre-populated list of local businesses to ask a business owner if they know any of the decision makers at or someone that might help you get in the door. Be sure to include businesses in a geographical area or in a particular industry.
  - Area usually works best because it can be used for multiple employers.

- ### Approach:
  - "Before I go, here's a list of people (or companies) I would like to work with. Can you take a look and let me know if you are familiar with any of these?" (This can lead to using the **Business Card Approach**, *See Below*)

Business Card Approach

- ### Preparation:
  - Go to the Referrals page on Propr and print your own referral labels (Avery labels - #6871). The label state "Please give (Your Name) 15 minutes of your time. I'm glad I did." Keep these with you in your portfolio.

- ### Approach:
  - "Do you mind if I use you as a reference?" Ask them for one of their business cards and apply your label to the back of it. "It just says we met and I know you. Would you please sign the back?"
  - Use the signed card with someone they recommended you speak with, or another potential account in the area.

LinkedIn Approach

- ### Preparation:
  - As you establish business relationships with individuals, connect to them on LinkedIn. Always customize the personal note section on the Invite to connect on LinkedIn. Tell them why you want to connect.

- ### Approach:
  - If you identify a business or a business owner you are trying to contact, look them up on LinkedIn. Look at the section on LinkedIn that says "How You're Connected." Are any of your current clients listed? If so, call them up or drop by in-person and ask if they know a business or individual. Assuming they do, go ahead and ask if they'd be willing to introduce you!