

DOUBLE YOUR SALES

Without Breaking a Sweat!

The right way to
use **referrals** to
grow your business.

By Jeff Shamus

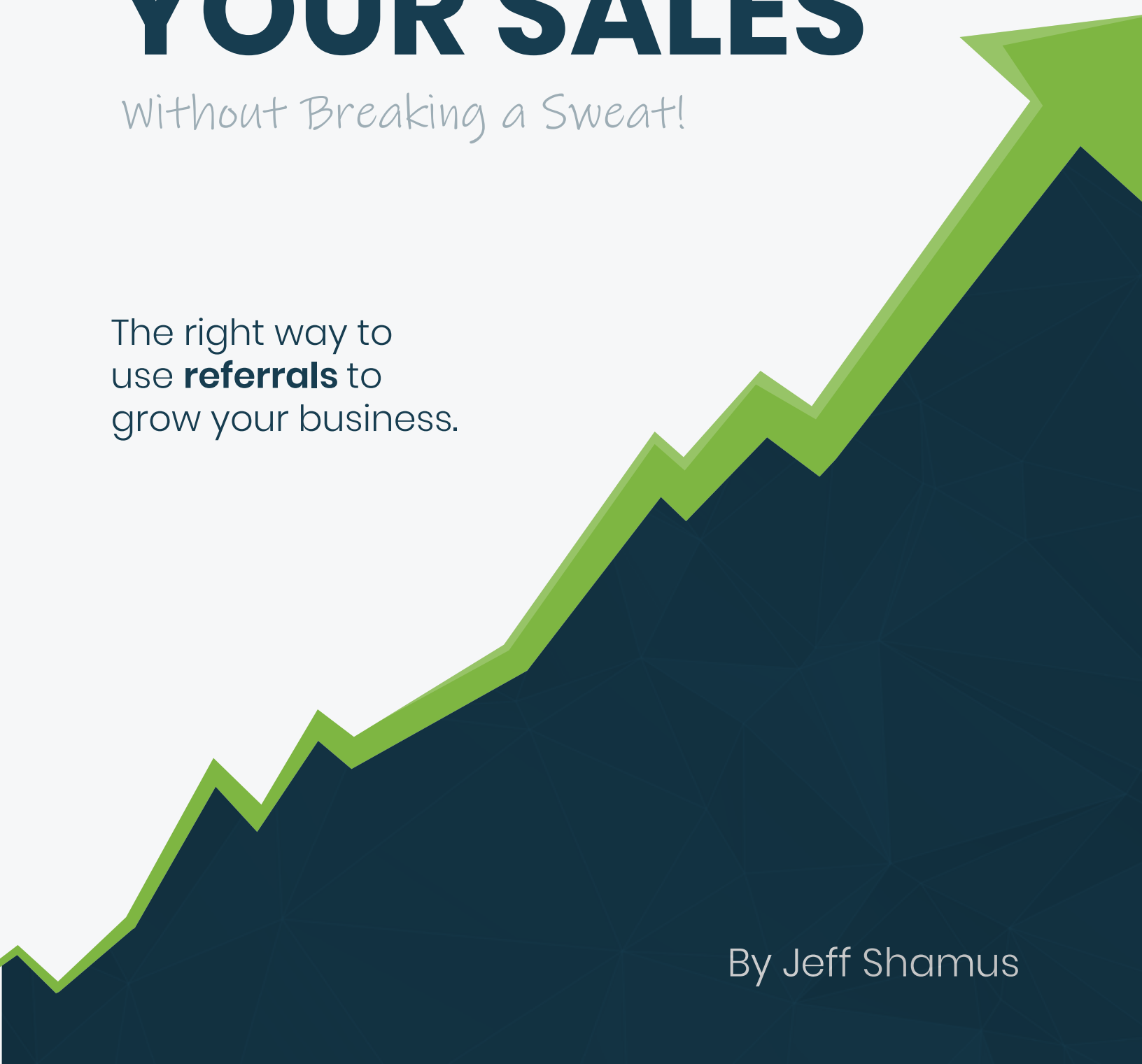


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Introduction: Your Marketing Dollars

You probably spend a lot of time, money and effort going after new business. You may use Facebook ads, Google AdWords, Radio and Newspaper ads or any number of other advertising outlets. Or you may spend money on marketing consultants, SEO, and other internet marketing experts.

Whatever your preferred method of throwing money down the drain, you have probably found it to be a frustrating and stressful experience.

When you spend your marketing dollars in these areas, it's hard to measure your ROI, but you keep doing it because you do get SOME new business from your efforts.

Then, once a new prospect comes through your door, the first thing you have to do is build their trust and do it quickly before they find someone else they would rather work with.

You had a great story in your advertising, but your prospect has seen it all before. Advertising always shines the best light on a company, and your prospects have been fooled before, so they proceed with caution.

People don't want to be the first to blaze a trail and buy something that doesn't have good ratings or a track record. Companies like Amazon, Google, Yelp and Ebay have perfected the way they get people to make buying decisions based on other people's ratings.

So now you have to convince your new prospect that you are a good choice to do business with. You could do this by using customer testimonials and you may even give your prospect references that they can speak with. But we all know that testimonials can be faked and of course they are only going to give you names of people who love them! In fact, who knows - you may be speaking with the business owner's mother!

What if there was a way to eliminate all these problems? What if you had a way to bring people in the door without spending a ton of money and without all the unknowns that come with traditional marketing? What if when you met the prospect for the first time, they already trusted you and already knew you were going to do a great job for them?

Too good to be true?

No.

There **is** a better way.

Using Referrals to Grow Your Business

You may be thinking, *“Asking for referrals is not new - I already do this - everybody does!”*

Every one knows that referrals are a great way to get new customers. The referred person already has some familiarity with you, or at least a good relationship with the customer who referred them to you.

You may already ask for referrals, and that's great. But this report will help you take your referral selling to the next level.

How Most People Ask for Referrals

Let's play out a common scenario...

You are sitting in the conference room with your team looking at your sales numbers, and you groan when you're reminded how much you are spending on Marketing. You are frustrated that none of your efforts are working. So you think...

"You know, I should ask my last client if they know anyone who they can refer to me."

The next time you see them, you say:

"Hey, do you know anyone who is looking for (whatever you sell)?"

Most of the time they will say "No, but if I think of anyone, I will be sure to tell them about you!"

Then you walk away satisfied that at least you asked.

On a good day you will get a better answer to your question:

"Hmmm... as a matter of fact, I think my brother-in-law is looking for (whatever you do). I will tell him about you the next time I see him."

This time you walk away more than satisfied and even a bit excited. You may even get a call in the next few days from the brother-in-law. But we all know that in most cases you will not hear a peep from them.

If this is what you call "using referrals to grow your business", you are going to continue to have a small, struggling business.

The good news is that in this report, you are going to learn a better way, **a more deliberate approach**, and some techniques that actually work.

Why Build a Referral Business?

1. You'll Do a Better Job With Your Existing Customers
2. You are Forced to Think Through and Plan out Your Entire Process
3. It's Easier and More Fun to Work with People you Know - or at Least Have Some Common Ground
4. It's Cheaper

1. You'll Do a Better Job With Your Existing Customers

If you start working with a new customer, and you already know you're going to ask them for referrals during and after the process, how do you think you are going to perform for them? Yes, we know that you already do a great job for every customer - but this takes things to another level. It's almost as if you are on candid camera and everything you do is being watched carefully. Don't you think this will motivate you to deliver SIX Star service instead of your usual FIVE Star service?

2. You Are Forced to Think Through and Plan Out Your Entire Process

When you are designing a business that is built for referrals, you have to really sit down and map out your entire customer journey. Every step in your process has to be carefully thought out, documented and followed by you and everyone on your team.

Furthermore, it's crucial that every customer you have, experiences the exact same awesome customer experience you have orchestrated.

For example, let's just say somewhere in your customer journey, like when the home loan closes, you send the client a special, surprise gift in the mail. You have just provided a "wow moment" and it really resonated with them.

Now let's say they refer their best friend to you and they say to them: *"Wait until your loan closes! You gotta start watching your mailbox, you are going to love the surprise you get!"*

If you are not providing a consistent experience, and you skip the special surprise this time, you just let down the very person who brought you your last customer.

Your referred client tells their friend - *"Yeah, I didn't get that same great experience that you described..."*

The next 3 customers that WERE going to get referred to you just went out the window.

3. It's Easier and More Fun to Work With People You Know – or at Least Have Some Common Ground

Have you ever had a difficult customer and you wished you had never taken them on as a client? I think we all have. When working by referral, this is much more rare.

Chances are, the people who are referred to you are more likely to be similar to the previous customer who referred them.

When someone is referred to you, you can skip over the part where you have to prove yourself. It's almost like you have come to them pre-approved!

Instead of having to brag about how great you are and having to spend the beginning of the relationship proving your worth, you can roll up your sleeves and get right to work.

Also, when you hit a bump in the road, which all buyer/seller relationships invariably do, it will be easier to recover and get back to the work at hand.

4. It's Cheaper

Spending money in the area of marketing is one of the most expensive parts of your business. And it often feels like your money is going into a black hole.

When you work by referral, you are able to spend less money doing cold prospecting, and redirect some of that money towards creating a better customer experience.

How many times have you looked at your marketing dollars spent and asked yourself: *Was that money spent...worth it?*

Would I have just as many customers today, if I didn't spend that money?

Your Sales Process Today

Before you can focus on orchestrating more referrals into your processes, you will first need to examine what you are doing today.

1. Map Out Your Current Processes

Sit down with a blank notebook and start mapping out your existing processes. Pretend you are your customer and visualize the journey you are currently taking them on from their point of view. You don't have to be super detailed at this point – a 3000 foot view is good for now.

Start with the first minute your customer is introduced to you and your company and follow it through until the transaction is completed.

2. Look at Your Processes With a Fresh Set of Eyes

You may have been doing business like this for several years. But in this step you must look at the map you just created from an outsider's perspective.

Examine all the steps you take your customers through (or in some cases, the hoops you make them jump through! 🤔)

Ask yourself: Is this the best possible customer experience I can offer? Can I do better?

In this step you must resist the temptation to dredge up your tired excuses about why you do things the way you do, and all the reasons you can't change things.

Create a New Customer Journey

and improved!

Now it's time to re-invent your customer experience.

Now it's time to reinvent your entire customer experience. We're going to rebuild everything from top to bottom, but this time with referrals in mind.

1. Imagine Your World Without Traditional Marketing

Before you build your new process you need to do a bit of pretending. If you were no longer able to do traditional marketing and the only way you could gain new clients was through referrals, what would you change?

When you meet your customer for the first time, what would you say? What would they see when they came into your place of business? How would you prepare them for the journey they are about to take with you?

Remember, we are pretending this is going to be the ONLY way you are going to get new business. You better get creative here - the future of your business depends on it.

2. Map Out a New Customer Journey From Start to Finish

Build a new customer experience and see it from the customer's perspective. The goal here is that the customer is so happy with you and your service that they are excited to refer their friends and family to you.

3. Put “Ask for a Referral” as Steps in Your Process

While every company is different, there are probably several times in your process where you should be asking for referrals. Then also, be on the lookout for spontaneous referral opportunities.

1. Sometimes at the beginning of a relationship, a customer might say something like: “I am so glad I found you” or “I never knew you offered all of these services”. This is a referral moment! Ask for a referral!

2. Look for milestones where you may have completed an interim step and your customers are always happy with you. That's a good place to put an “Ask For a Referral” step.

3. At the conclusion of the transaction, decide the best time, and best way, to ask for a referral. It could be immediately after the transaction or it could be a week later during your followup.

4. No matter where you are in the customer journey, and no matter if you had planned to ask for a referral at that step – any time your customer goes out of their way to tell you how great you are, drop everything else and ask for a referral!

Scenario:

Them

“It is such a pleasure working with you! You are so good at what you do.”

You

“Thanks for the kind words. I work hard to make sure each and every one of my clients receive this same great service. And I like working with people like you. Can you help me find my next client?”

4. Set the Expectation From the Start

Create a script that tells your client you are serious about referrals and that you expect them to refer people to you.

Sometime near the beginning of your customer journey, give a speech like this:

“Most sales people spend half of their time away from their clients trying to drum up new business.

I prefer to spend the majority of my time with my clients making sure the process goes as smoothly as possible. If I do a great job, and you are happy with my work, my hope is that you will refer your friends and family to me.

When referrals are sent my way, I am able to spend more time focusing on my current clients and less time out looking to grow my business.”

How Your CRM Can Help You Work by Referral

Your CRM can be an important tool to help you work by referral. *Why do this - everybody does!*

Next, we're going to look at some of the areas where you can have your CRM do the heavy lifting:

1. Workflows with you, or at least a good relationship with the customer who
2. Follow Up When You Say You Will
3. Track Email Clicks & Opens rails, and that's great. But this report will help you
4. Referral Tree al selling to the next level.

1. Workflows

Building your customer journey into a CRM Workflow will go a long way towards you being able to create a consistent customer experience. Workflows can contain 20, 50 or even more steps, and can include if/then logic as well as “pause for X days” steps.

When you use a workflow, you don't have to remember every single step - the CRM will do the work it can do on it's own and then remind you when you need to get involved.

2. Follow up When You Say You Will

CRM's are great for helping a small business follow up with clients. When you say you will call them in 30 days, call them in 30 days! Not 28, and not 31. Remember we are showing our clients that we are capable, reliable, and they can count on us to do exactly what we say we will do.

Following up when you say you will, will also help you stand out from the competition. Your CRM will store your list of todo's and then remind you when it's time to follow up.

3. Track Email Clicks & Opens

One of the magical things a CRM can do is to keep track of which clients are opening your emails and clicking on your links. Once you know that your customers are engaging with you, by reading your emails, you can be more proactive and you are able to reach out to your contact at exactly the right times.

In the AllClients CRM there is a Recent Activity Widget that lives on your dashboard. Enabling you to instantly see who is looking at your emails. First you will see how many are engaging and then you click on that number to see the details of exactly who they are.

4. Referral Tree

Referrals are awesome, but keeping track of who is referring whom is a bit more tricky. AllClients was the first CRM to include an Automatic Referral Tree that builds itself as referrals come in. You can see the complete tree, even if it is several levels deep.

There is no guessing here. A referral tree allows you to see your best referral partners at a glance. Then once you know who your most valuable referral partners are, you can nurture those contacts and get even more from the same folks.

Referral **Scripts** and Ideas

I'm going to share with you some scripts that you can take and adapt for your business to start boosting your referrals right away.

1. Let's Make a Deal!

"John, throughout this journey I will be doing my best to show you all the benefits of working with me.

Then I like to get 2 referrals from each of my clients. That way I can spend more time with my clients and less time out pros[ecting for new business.

Don't ask for more than 2. Everyone can think of 2 people to refer to you, but when you leave it wide open, it's harder to get any referrals! Plus chances are, if you can get the 2 referrals from a client, they will likely give you more down the road."

2. You Are Going to Notice...

"Along this journey we are taking together, you will notice friends, family and/or co-workers who need these same services I am providing to you.

If you are happy with me and my services, it would mean the world to me if you tell them about me. Even better, you just give me a call and give me their contact info.

I will be happy to follow up with them to see if I can provide the same great service I am providing you."

You can even get more specific here. If you were selling houses, you might say:

"Who are some of your friends that are still renting? I'd love to help them make the dream of home ownership a reality."

3. Who is the Next Person You Know?

Instead of asking “*Do you know anyone...*” Use the words: “*Who is the next person you know...*”

This slightly different dialog triggers something in the brain that produces more and better referrals.

4. Can We Take 5 Minutes?

“Mary, do you have 5 minutes to help me with a very important exercise?”

“I’d like to take 5 minutes with you to think about your sphere of influence and think about who the next 2 clients that you think could use my help.”

This strategy is more direct and usually products great results.

5. Will You Do Me a Favor?

“I wanted to thank you again for choosing to do business with me. I know you have a lot of choices out there.

How are you feeling about how things are going so far?

Would you do me a favor?

While we are in this process you will meet others who are about to take this same journey. Can I count on you to refer at least 2 people to me?

6. Let's Call Her Now

When someone says they have someone specific they are going to refer to you, don't just let it end there. Chances are they will forget or just never get around to it.

If you are in the proper setting say this:

"That's great that you are going to refer Sally to me. Hey, why don't we call her right now and you can do the introduction?"

If you can pull this off, this will result in a much stronger referral.

When your client introduces you, you will be sitting right there in front of them. So your existing client will go over the top and say glowing things about you and your company.

Referrals Are a Game Changer

Working by referral can be a game changer for your business.

If every customer refers just 1 person to you, that could be enough for you to work exclusively by referral (instead of spending your days chasing sales).

The #1 reason most businesses never build a strong referral network is they simply aren't asking for the referral.

If you take just one thing away from this guide it's that your referral strategy needs to be deliberate.

By making referrals a part of your process, you'll be ahead of all your competitors instantly.

Additional Resources

If you want to take referral selling to the next level, there are two marketing giants who can help you dive deeper in this area.

Joe Stumpf has been teaching the principles, providing the systems and modeling the behavior of referability for over 30 years. He has written several books on the subject and his company, By Referral Only, helps real estate agents and lenders build their entire business on referrals.

Joestumpf.com
Byreferralonly.com

Dean Jackson is an Internet marketing guru and is credited with inventing the Landing Page (originally called a “Squeeze Page”). Dean preaches the benefits of orchestrating referrals to grow your business and has several resources on the web that teach these concepts in depth.

DeanJackson.com
ILoveMarketing.com
MoreCheeseLessWhiskers.com

Exclusive Offer

Hey! Let's make a deal! How about if I give you **50% off** of AllClients for your first 3 months? And assuming you love it, you refer 2 of your friends to us?

Does that sound fair?



Jeff Shamus
CEO & Co-Founder

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