

You've done the hard part! You found a potential customer, you earned their trust *and* their business, and you have or are delivering a terrific project. You've asked for feedback, and your customer 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 he 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 to activate on his sentiment. Done right, you will get the referral you so eagerly want, and you'll help your customer 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. 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 customer feedback for the last year or two.** Look at comments and trends – have you had a consistent level of "promoter" sentiment, or is this a newer level of engagement? Are there any comments indicating WHY the customer feels so well cared for? Make a note and bring those with you to your meeting.
- ❑ **Discuss what other team members know about the customer,** including potential success stories. You don't need to know everything, but a few quick conversations with your colleagues may unveil helpful information. Do they know others the customer knows 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 your customer is already connected to. LinkedIn allows you to bring potential introductions to your meeting.

In summary, come prepared with a couple of successes recognized by the customer 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 is not a good idea. Use your judgment situationally, but I suggest inviting the customer to a meeting to discuss project success. Perhaps use a message like the example we've shared below

#### **Subject: Project Success Conversation Request**

Dear Customer,

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 customer insights you've uncovered. Start the conversation with cordial talk, inquiring about the customer's interests and activities. Then, move toward the success conversation. Provide any prompts (discovered successes from their feedback or internal conversations you had with your team). 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 customer and gain confirmation.**

Now that you've celebrated success (and perhaps reminded your customer of what great work you did), and now that you've clearly put the customer'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 customer!*



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 customer thinks too hard, or seems to struggle to make a connection, offer a few suggestions. "You know, I've been really wanting to get connect to [name 1, 2, and 3]. Do you know them? If yes, would you be willing to facilitate an introduction?"*

5. *Thank the customer!*

Notice the emphasis on the phrase "we might help like we've helped you" – this wording provides a compelling reason for him to make the introduction. By introducing you, he knows he is helping you but recognizes he is also helping his friend. This makes the introduction more comfortable for him to make.

If you've done this well, and if you're getting a good vibe, you may even make a bolder ask. You may request reviewing the customer's LinkedIn contact list together. You might be surprised at how often customers 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 of your customer's colleagues with a project. With that mutual success, he may well 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 your customer agreed to introduce you to and restate any specific problems your customer indicated you might help with. Thank him 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 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."

❑ **Extend the trusted relationship – get curious.** Once you get the referral, 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 he knows about the project you helped his colleague 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. Because you were referred to him, building a trusted relationship will likely take less time. Don't be surprised if the potential new customer asks you for help before you even offer.

❑ **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 your customer, you accomplish a few things:

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