

Module 5: Be Referred

Module 5 is about Being Referred!

In this module you'll increase your client base by *being referred*:

Use the lines below to list as many people as you can that could be a potential COI. Remember that a good COI is someone who is a people person, they are master networkers and can often be considered the "mayor" of the local business world.

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Next, list out 10 people whom you will reach out to NEXT month and then reach out to them personally and ask to meet for coffee or lunch.

Month One:

Name

Date to Meet

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

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Month Two:

Name

Date to Meet

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

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Month Three:

Name

Date to Meet

1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Once you have met with everyone, schedule to check in again in the next quarter. Keep repeating. You will at times remove and add names to your Potential Referral List.

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How to gain referrals:

o **Meet COI regularly**

Educate your COI with who a good referral is (who is your ideal client or situation)

Keep them in the “know” of what is going on

How should they make a referral? Email? Phone?

o **Create a Warm letter**

What will you update your COI on?

Mail out letter hand addressed

Follow up with a phone call

o **Current Clients**

Make them aware you are open for referrals (be sure to ASK!)

Reward them (how will you reward them?)

Can you increase what you DO for your current clients?

o **Post Referral Strategy** which WILL ENSURE you are being referred over and over again :

Reach out to potential client IMMEDIATELY

Let the Referrer know you have been in contact

If you close the deal, send a monetary Thank You

\$\$\$\$\$ and opportunities are Always in the Follow up!!!

Most of our missed opportunities is in the lack of the follow up.....