



**New Language of Sales**

The Coach Approach to Sales

## REFERRALS

### REFERRAL VERBIAGE

#### Option 1

Over the past several months I've talked to many people who are worried about (insert concern here i.e. market volatility, taxes, retirement)

Have you talked to anyone recently who is concerned about that?

If they answer yes.

As part of the services you are entitled to, I allocate (insert how many hours per week i.e. 2 hours per week) for any of my client's friends, family or associates to:

a) Share some ideas and use me as a sounding board.

OR

b) Take them through the same analysis/process we use with each of our client to make sure that they know where they are today, where they want to be in the future, and have a plan of action to get there.

Do you feel those people would find value in this type of consultation?

If they answer yes:

What would be the most comfortable way to introduce me? Lunch perhaps?

OR

Use the letter approach below.

#### Option 2

My business development plan is based largely around referrals.

May I share with you how we would deal with someone you introduce to us?

It is very important to me to never put a client on the spot about something as personal as referrals. Many of my clients are comfortable and very happy giving referrals; some are not, and that is ok too.

First confidentiality remains one of my utmost priorities. I would never discuss with anyone, any aspect of your account.

Next, I like to use my client's names as a means of introduction, otherwise I would be simply a stranger calling, and nobody likes that. I have found that when I have a meaningful introduction, people are flattered to be contacted.

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## Referrals

My process is simple. I will simply mail a letter stating that you suggested that I might be able to offer them some assistance, and briefly introducing myself. I then follow up with a low-key phone call. If it makes sense for us to pursue things further, it will be entirely their choice.

Would you be comfortable introducing me to people that you know?

**IF NO** – Do not give it a second thought and thank you for even considering it.

### LETTER

While we have not met, my friend and client Mr/Ms Client speaks very highly of you.

Mr/Ms Client and I have been working together and he/she has been extremely pleased with what we have been able to accomplish OR he/she has been extremely pleased with the level of service I have provided and the relationship we have built over the years. He/she thought that I might be able to help you as well.

I thus would like to meet you and plan to telephone you in the near future.

If you have any questions or concerns in the mean time please do not hesitate to give me a call.

Sincerely,

### PHONE CONVERSATION

Mr/Ms Client and I had a conversation and your name came up.

I did send out a letter to that effect last week.

While Mr/Ms Client didn't tell me anything specific about your situation he/she felt that because I use a very specific business model that there might be some value for you in knowing more about it.

**PAUSE AND LET THEM TALK.** They will now guide the conversation.

**NO PRODUCT INFO**

Ask curious questions– get them talking

Once they are engaged in conversation, request a meeting.

The longer you talk with them on the phone, the less likely they are to meet with you.