



# 88% of Your Clients Are Willing to Refer You!

**BILL CATES**  
[Referral Coach International](#)

## **You Are Probably Sitting On a Goldmine**

I just got off the phone with one of my clients – a leader at a top-level financial planning firm. He told me that their surveys consistently show that 88% of their clients are “willing to refer” their advisors. Unfortunately, these advisors are not tapping into the goldmine right next to them.

## **What Are They Afraid Of?**

Like most people, they are afraid of looking needy, appearing pushy, putting their client “on the spot” or just plain afraid the client will say, “no.” But these clients love them! Maybe all they need is the right approach – so they can feel confident and comfortable enough.

## **It's Time to Strike Gold**

This is so simple and so easy, you are going to wonder why people make this so complicated. Simply call your client or at your next meeting, say something like this...

‘George – Thank you for completing the survey our firm sent to you. Your feedback is extremely important. I noticed that you checked ‘yes’ on the question that asked if you’d be willing to recommend me to others. To me, that signifies a high level of trust and it’s been great working with you over these last few years.

“I’m curious, when you checked ‘yes,’ did you have specific people in mind you think should be aware of the important work I do? Or was it more of a general ‘vote of confidence’ that if someone asked if you were ‘happy with your advisor’ you would recommend them to me?”



**“Yes – I have a couple people in mind who should know about you.”**

“That’s great. Why don’t you tell me why you think they should know about me and my team and then we’ll craft an approach that will be comfortable to everyone and, at least, pique their interest in hearing from me. Sound fair?”

**“No one in mind at this time. But I’d definitely be willing to recommend you.”**

“I understand. Tell you what, let me tell you how I might receive such a recommendation so when the time comes, you’ll feel comfortable.

“First – all the work we do is completely confidential. They won’t learn about your financial situation and vice versa. Even with close family members, we can’t cross that line.

“Second – I like to handle these things with great care. I don’t want to call your friend or family member and make them wonder, ‘Why did George give my name out to this guy?’

“I like to work through introductions. Typically, my clients will introduce me with an email. They say a couple of nice things, cc me, and follow up from there. Whenever possible, it’s great to be introduced in person, so I’d be happy to treat you and friend to a meal or a round of golf.

“Whatever we do, we’ll make sure everyone feels good about the process. Sound good?”

## **What Are You Waiting For?**

Your gold is right in front of you. It’s right behind a very thin layer of fear. Take that pick ax of courage and chip away at it. You’ll meet more people who value your important work and make more money in the process.

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