

Unlocking the Power of *Client Referrals & New Introductions*



The Art of Introductions

Timing is crucial when asking for referral introductions because it can significantly impact the likelihood of a successful outcome. Here are three tips explaining the importance of timing and how to approach it effectively.

● ● **83% of customers are open to referring a business after a successful experience.¹**

Leverage Moments of Satisfaction

Timing should coincide with moments when your clients are most satisfied with you. When they're happy, they are more likely to provide a referral.

Strategic Touchpoints

Identify key touchpoints in your client's experience with your practice. Referrals should feel like a natural part of the process and during socialization.

Be Strategic

Identify a specific person you want to be introduced to. To be successful, you'll want to include three key things:

Three Introduction Tips Top Advisors Use to Get to a "Yes"

1	2	3
Identify a Specific Person Don't be generic and ask for a group that's from their sphere of influence.	Make it a Group Activity Include the known person connecting you to the referral. Use their knowledge of you to expedite the new relationship.	Identify an Outcome Include an activity and date to attend look for a yes, or no response. Be precise.

Be Inquisitive & Provide Insight

Share relevant insights.

Offer advice or solutions based on your expertise that align with the challenges they've discussed.

Offer resources.

Share industry-related articles, tips, or tools that could be valuable to them.

Connect on LinkedIn or collect business cards.

Explore collaboration opportunities.

Discuss potential partnerships, joint ventures, or ways you can support each other's businesses.

Offer referrals.

If appropriate, offer referrals to their business based on your network and connections.

1. <https://www.thinkimpact.com/b2b-referral-statistics/>

Understanding Strategic Small Talk & Winning Introductions

Advisor Referral Introductions

Advisor:

"Hi Rex, nice to see you. Last week at golf you mentioned your partner, Jeff. I'd like to meet him."

"Why don't we all grab a beer at Sullivan's?"

"Let's have the three of us grab coffee next week. Are you free Thursday?"

"Hey Travis, why don't you invite Matt and his wife to join me at a charity event next week on Friday? I have a table for us."

"Hey Travis, next time you go fishing with Scott, do you mind if I tagged along? He sounds like a fun guy, I'd really like to meet him."

"I'm happy to support your fundraiser. Can you make sure I sit by Scott and Judy?"

"Nice to see you Travis. Hey, is that your friend, Scott over there? Would you mind introducing me?"

"Hey, Susan, I'd like to meet your colleague Jerry. When would be the best time for us to get together?"

"I'm putting together a foursome of golf Friday. Do you want to join? Do you think your partner Johnny would like to join us too?"

"Nice to see you Susan, I haven't seen you in a while. I have tickets to the ballet, would you and your partner want to attend next month?"

"I'm sponsoring a table at Young Women on the Move. I'd love to have you come. And, I'd like to invite the friend you mentioned a few weeks back, I think her name was Betty? Isn't she getting ready to sell her business?"

"You mentioned that your brother might be considering retirement soon. You should probably introduce him to me—just to make sure he's got his bases covered and maximizes his benefits. That's my specialty and I'm happy to help."



Following a Positive Experience:

Here's the introduction that works.

Advisor: Hi Travis, it's Frank. How's it going?

Client: Hey Frank, I'm doing well. What's up?

Advisor: The carrier received your wire transfer. It looks like we're all good and getting your policy funded. We should have everything in place by the end of the week.

Client: I appreciate it Frank. Thanks for your work on this. Is there anything else you'll need from me?

Advisor: No, you're set. If you know of any friends or family that you think would enjoy working with me, I'd appreciate the mention of my name to them.

Client: OK, let me think about it for a day or two.

Advisor: That sounds good. I'll give you a call in a couple of days. Appreciate it, Trav.

Client: See you soon.

Advisor: Take care.

Advisor: Well, we all know there's an election coming up, and with that comes uncertainty.

Client: Oh, don't I know it. Ha.

Advisor: I just wanted to mention that if you have any friends or family that could benefit from what our team has done for you, we have some openings for discovery meetings the next couple of weeks, and I'd love to get some of them on our calendar.

Client: I've got two people right off the top of my head. I'll send you an email with their information.

Advisor: That would be great, thank you.



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