



How To Make More Sales In Less Time with Referrals!

Bonus Report

The Financial Industry “Who Do You Know?” List

OK, Here’s the deal...

When I conduct this exercise in a session, I don’t give out this list right away. It’s because the list won’t make a difference in your income. Only when you commit 10 or more of these items to memory, such that you can recite them at will, do you have access to them when the opportunity arises.

I’ll go one further to ask you that once you do commit the time and effort and truly memorize them, will you be more likely to actively create opportunities to ask for referrals? You’ll find your confidence level increases dramatically when you commit to memory these “Who Do You Knows...” to prompt them, and most importantly your “Bridge” to go from any conversation to a request for referrals.

When you’ve got a few statements to “Bridge” a conversation into a request for referrals, doesn’t it just make sense that you will do it more often, in many more social and business settings than you probably are now?

I’ll go one further, that if you do not memorize 10 or more of these, you are not likely to use them, or get over the confidence “hump” to where you are pro-actively asking everyone within three feet of you “*Who Do You Know That...*”

So, I implore you to schedule and invest the time to grapple with what *you* will say to bridge a conversation and how you will prompt people to think of others they can refer to you. Pull from this list and write them on a 3X5 card and keep it with you. Review it often. You’ll need some repetition to get the unconscious competency you need for instant access to them.

The time you invest could very well provide you the greatest return on that investment each and every month by improving your ability to make more sales in less time by consistently developing better qualified leads from referrals!!



How To Be Even More Effective At Getting Referrals!

1. Create a list of 10 to 20 "**Who Do You Know's**" that apply to your market. Consider profiling your best clients and categorize what makes them such a great client. ex. "**Who do you know who manages a Sales Staff of 10 or more people?**" Memorize them so that you can trigger their memory of contacts and associates that could be prospects for you.
2. Establish Rapport with your Prospect/Customer so there is reciprocity for them to want to help you.
3. Put your Prospect/Customer in a great "State of Mind" so they are feeling good when you ask them.
4. Be ready to write on something, ideally, have a stack of 3X5 cards ready.
Create a bridge to ask for the referrals like *"I've so enjoyed getting to know you, I wish I had a dozen clients like you! May I ask of you a favor, because I need your help... my business grows the most from referrals, and I wonder if you'd be willing to be my eyes and ears out there and refer me to people whom I could serve with the same level of commitment and professionalism which I've shown you, and become a kind of "Advocate" of mine to help me build my business?? ...Thanks, because I am so grateful for your help! The kind of people I can serve best are those who... (then use your "Who do you know... list")*
5. Once you ask for the name of the Referral, just write down the name and whatever information they offer first. Don't press them for all the details yet, because you want to get as many names first, then the details later so as not to take too much time on the front end and deter them from giving you more names. It's easier to get details later. Express your gratitude for their time and of how valuable their referrals are.
6. After they've given you all the names they can think of, ask them *"May I ask you, if you were me, who would you call first??"* Prioritize your leads so that the most likely to buy is served first and at the top of your list. I just mark a number at the top corner of the card in pencil, as it makes it easier later to remember.
7. Then ask *"I'd like to offer them a compliment on your behalf as well as get to know a little about them. Could you tell me what do you admire most about this person?? Perhaps one word or character trait that describes them best?"* Go down the list of people and get a descriptor and any other information they'd like to offer starting with the most qualified prospect first. Write it below their name.
8. Then you can go back and get the rest of the information. If you start by asking for all the details of each lead as you go along, they may not offer as many leads, but once you've got all the names, it's easier to get them to complete the process. Offer to **"May I copy and fax these to your office so it's more convenient for you to look up their contact information?"**
9. Now when you call the prospect, you can use the quality or character trait as an icebreaker and way to build rapport. Start with something like *"Hello, Mr. Prospect? You and I have never met but have a mutual friend in (John Referralgiver), he told me you are one of the most dedicated (Quality Described) persons he knows, and I really admire that because I consider myself very dedicated to my work as well..."*

Go the extra mile to serve them well and make your new prospective "Advocate" proud! Might each new sale become an "Advocate" and be worth 10 or more sales too?? Doesn't this and all of your success really depend on you and what you bring to the table?? Be Outstanding and *Enjoy the Journey!!* Jimmy Z



The Financial Advisor's Master "Who Do You Know?" List

Circle and prioritize the ones you like most and re-write the words you'd use on a 3X5 card for maximum repetition. Memorize at least 10!! Have fun with it!!

WHO DO YOU KNOW...

1. Who takes their future as seriously as you do?
2. Who's in their 30's or 40's and may need to re-assess or even develop their financial plan?
3. Who's in their 50's or 60's and may want to accelerate their retirement plan?
4. Who's a dual income family, and working hard toward their financial goals?
5. Who is the most successful person or business owner you know?
6. Who's the most active person in your community?
7. Who's an Accountant or does CPA work?
8. Who's an Estate Planner?
9. Who's a Mortgage Broker?
10. Who's a lending officer at a bank?
11. Who's a Corporate Attorney that specializes in buy/sell agreements, or works with business owners?
12. Who handles Home Owners Insurance?
13. Who's a Divorce Attorney?
14. Who's divorced or in the process of getting a divorce?
15. Who's an Elderly Care Attorney?
16. Who might be concerned about Estate Taxes?
17. Who would like to reduce their taxes?
18. Who is a tax attorney?
19. Who has recently been hurt by the market downturn?
20. Who is looking for financial safety & guaranteed income?
21. Who's living on a fixed pension?
22. Has been living in their home for a long time and may be interested in leveraging some of their home equity into an investment plan with even greater returns?
23. That is soon to be an "Empty Nestor" and may consider downsizing to create more investment capital?
24. That has gotten a new job, and looking to assess their financial plan?
25. That has gotten a promotion and is looking to leverage their increased income?
26. That has been laid off and needs to create more clarity as to where they're at and when they can retire?
27. That has just had some kids and need to plan for future college expenses?
28. That has elderly parents and needs to plan for long term care insurance?
29. Who has recently moved into the area, and may need to adjust their financial plan?
30. Who is getting married?
31. Who is getting divorced?
32. Who is having a baby?
33. That has come into some money and wants to secure it for their future?
34. Who is very wealthy and an active Investor?
35. Who is an active Real Estate Investor?



The Bridge

The Bridge has two parts. The first part acknowledges your appreciation and gratitude in the relationship, and the second part asks for their help as in **The Close** below. Some examples are like this:

- ◆ *"John, I really appreciate the opportunity to work with you. May I ask you a favor, because I really can use your help?"*
- ◆ *"Wow John, I really enjoy doing business with you, I wish I had a hundred customers like you! John, I wonder if I can ask you a favor, because I can really use your help?"*
- ◆ *"John, I am so happy to handle that for you. It's a business doing pleasure with you! John, may I ask you a question, because I can really use your help? "*

(After a first call with no sale)

- ◆ *"You know John, I'm looking forward to doing business with you when the timing becomes right. I really enjoyed meeting with you, and appreciate the time we have spent here. I wonder if I can just take another moment here to ask you for your help?"*

(Over the phone)

- ◆ *"Hi John! This is Jimmy Z! How are you doing?... or... How's it going? (If you can follow up on a success you helped create) Well that's great! (or something to acknowledge the conversation you've just had). Well John, (use their name whenever you can because it's more respectful) I called you to ask you a couple of questions, because I can really use your help!"*

You are welcome to use them, and you can surely come up with more. The key is that you must practice what you'll say over and over to make it your own. Only with repetition will they lose their "borrowed" quality and truly become your own. There is a level of "*unconscious competence*" that is achieved after much repetition that makes them accessible to you without even thinking. Aren't there things you consistently say right now in your presentations that you don't even think about anymore?

The Close

Now you just need a simple "Communication Frame" that leads you and them to the request. Try these on for size, right after The Bridge:

("John, I really enjoy doing business with you, I wish I had ten customers like you! In fact, may I ask you a favor, because I can really use your help?...")

"My business grows the most from referrals. I wonder who do you know that... (is also in a purchasing position like you are, that I could serve with the same level of commitment and professionalism that I have given you?)"

Or

"I wonder if you'd be willing to be my eyes and ears out there and refer me to people that I can serve with the same level of commitment and professionalism that I have given you, and become a kind of advocate of mine to help me grow my business?? Well Thanks, I am very grateful for your help! Who do you know that..."

Reprinted from Jimmy Z's "How To Make More Sales In Less Time With Referrals! eBook at TurboCoaching.com