



The Art of the Referral....

All referrals are not created equal!

- Some are **name dropping referrals** – this is when you allow someone to use your name; this is little more than an awkward cold call.
- There's the **email referral**; you send an email to someone and CC the person you are “referring” so you now have their contact info is now shared. Sure, there is notice but no recommendation or exchange of permission.
- And then there is a “**qualified referral**”; these are much fewer and farther between. This is when you talk to both sides, confirm the fit is good and get permission to establish contact; this is a meeting you might even join in!

Who should you refer? A qualified referral should have the following attributes:

- They should be very good at what they do; whenever possible, you should have first-hand knowledge of their work.
- They should keep their word; when they say they are going to call they do. It's shocking to hear a prospect to say, “I didn't think you would call.” They have experienced being poorly referred.
- They should be easy to deal with.
- They should show Thank You – not just say it; acknowledge a referral both privately and publicly.

How should you refer? “Mary meet Jennifer; Jennifer, Mary...virtual handshake please”.

- A referral is not a blind date; both parties should know what they are in for.
- Establish a point of reference for follow up conversation. “Jennifer, my friend Mary mentioned that she was looking for a bookkeeper and I immediately thought of you because of the rousing endorsement you received from Joe last week. Would you like me to make an introduction?”
- Tell Jennifer a little bit about how you know Mary - is she your sister, your neighbor or a casual acquaintance you overheard at your daughter's dance class.
- Give Jennifer an out; she may be too busy; she may already know Mary. Let her know what you intend to do before you do it.
- Let both parties know you are expecting them to follow up without you once you've made the initial introduction. “Mary, I know a great book keeper. Would it be okay if I passed your contact information on to her or if I made a virtual introduction?”
- Follow up – ask Jennifer is she was able to get in touch with Mary; ask Mary if she heard from Jennifer then STEP BACK; this is now their relationship. You are not privy to the information about their business relationship.

What is not a referral?

- News about a meeting of business owners, a chamber, vendor show, or happy hour, is not a referral; it's an announcement – an exchange of information.
- Giving someone a “referral” but telling them NOT to use your name with the prospect.
- “Referring” someone to a prospect but not telling the prospect you did this.
- Providing someone with multiple options for the same profession; this is not a referral but an exchange of information.