

Section 7.4: Referrals

Referral scripts - for unclosed leads

Person 2: How do I write a referral script?

Person 1: "So let's talk about the referral script for Unclosed leads. These are the leads that you were not able to close. Like you tried everything you could, you downsold, you went through funding, you, you tried literally everything and you still were not able to close these leads for whatever reason. Maybe they weren't interested or maybe they had a spouse partner objection that they just could not overcome. Maybe, I don't know, maybe they just literally couldn't afford it, right? This is when we were gonna use this process right here, this script right here. So again, when to use it. We use it at the end, the very end of a close call, right? A call that we cannot close. Again, this is last resort. We don't default to this. We're not like, Hey, this leads kind of hard to close. I'm gonna ask for referrals. It's like this is the very end before you hop off a call. This is not a replacement for anything that you do. This is just like, Hey, before I hop off the call, rather than just doing small talk, I'm gonna do this little piece right here."

Person 2: "I see. So, how does this script work?"

Person 1: "It's much shorter. It's literally just, you're gonna say this at the end of the call and you're gonna get them to agree to basically do a text intro and here's how it works after the call. Again, you can't close and you tried everything like nothing's worked. And it's like, all right, you're about to hop off the call. But instead of hanging up, you do this. We say, Hey, by the way, we do have a referral program where we pay you \$3,000 for anyone you refer. Is that something you'd be at least slightly interested in? I know X YZ wasn't a good fit today, but I thought I'd just bring that up and most of the time they'll be like, yeah, I'd be slightly interested in it."

Person 2: "Okay, got it. Then what happens next?"

Person 1: "If they say they're interested, you want me to just kind of break down how that works real fast just to see if it might be something that might be a good fit?"

Person 2: "Yeah, sure."

Person 1: "Okay, cool. The prospect says, right, you go, okay, cool, I'll break it down for you, but just so I'm not wasting your time. How many names could you think come to mind that might also want to result just off the top of your head? And they'll go, oh, I think probably like three or four people I could think of. Or they'll be like, no one."

Person 2: "Okay, I see. And then what?"

Person 1: "You'd be like, just, just ballpark for me if there's anyone you think might be slightly interested, how many people can you think of? Right? And the keyword is how many people not? Can you think of? A lot of people say, do you know anyone you can refer? And the answer is usually no. But if we say, how many people can you think of? Usually people start to actually, you know, think."

Person 2: "Okay, I understand. Then what do you do?"

Person 1: "They say none. And you're like, no one, come on. You gotta know someone, John. Like, you just kind of push them to say how many people in hypothetical reality

Referral scripts - For Clients

Person 2: How do I make a referral script for clients?

Person 1: "Let's talk about referral script templates for clients and how to ask for referrals in a way that's not pushy and benefits the clients. It's for people who have already signed up with you and have paid for your service or product."

Person 2: "Okay, I see. So how do we actually get our existing clients to refer more people?"

Person 1: "We want to ask for referrals at the right time. When we ask is just as important as how we ask."

Person 2: "Makes sense. So when is the right time to ask for referrals?"

Person 1: "The first thing we want to do is call every client around two weeks after they've joined, or when they've had their first big win with our program. It's important to ask when clients are happy and excited about the results they're getting."

Person 2: "Got it. And what about when clients are unhappy?"

Person 1: "Believe it or not, those moments are actually a good time to turn things around and over-deliver for the client. If we can solve their problem and make them happy, they may even become happier than clients who never had an issue in the first place. And happy clients are more likely to refer others."

Person 2: "Interesting. So we just need to follow this approach and ask for referrals religiously?"

Person 1: "Yes, exactly. If we call every client at the right time and ask for referrals, we can help more clients in the future and grow our business."

Person 1: We need to stop texting and asking for referrals. If we want high conversion rates, we need to do it over the phone. There's so much more social pressure.

Person 2: Why is social pressure important?

Person 1: They can't just ignore it. And they can't just say no, we can handle their objections. You wanna do it over the phone.

Person 2: Okay, so what do we do over the phone?

Person 1: We give them a reason for calling, then it is optional, but it's very effective. We give them something to create reciprocity bias.

Person 2: Reciprocity bias? What's that?

Person 1: A lot of times when you walk into a kind of a fancier store, what do they do? They give you a water bottle, right? And it's obviously a nice gesture, but the reason why is statistically people, if you gift them something first, they're more likely to spend more money because there's reciprocity bias.

Person 2: I see. So what do we give them?

Person 1: We give them something at the beginning of the call to create some reciprocity bias. And then we ask questions to get them to talk about their wins, what they're loving about our service or product.

Person 2: Why is that important?

Person 1: We get them into a really high emotional state. If they're talking about how much they love what we do, they're talking about their wins, they're talking about what's most exciting, that's the frame of mind that they're gonna be in.

Person 2: I get it. So what if we ask them what's going wrong?

Person 1: Then they're gonna be talking in that state of mind and that's where they're gonna be. We can direct someone's perspective to how they're viewing. We want to ask questions that make them talk about how happy they are.

Person 2: That makes sense. So what do we do after we get them in a good state of mind?

Person 1: We ask for the referrals. And we do it in a way that's in their best self-interest, not ours. We have this really amazing incentive for you to refer and it's really easy. All you need to do is send a text intro.

Person 2: Okay, got it.

Person 1: "That said, let's kind of dive into the script. This is a template, so fill it out, tweak it to make it fit your business. And then also this will change if it's the first time you're calling them or if you call the prospect in the, or a client in the past and you're asking for another referral. So that being said, here's how it goes. Hey, name. I was just thinking about you, so I thought I'd give you a call to see how you're doing."

Person 2: "Oh, okay. So we just call and check in, right? And the reason for calling can change depending on the situation?"

Person 1: "Yes, exactly. It might be because they had an amazing win, or maybe we heard they're unhappy and we want to solve it personally. We just want to make sure we're taking care of our clients at the highest possible level. So we call and say why we're calling."

Person 2: "Got it. And then you mentioned something about reciprocity bias?"

Person 1: "Right, that's optional but recommended. It's where we give them something, like free training or a gift, to show our appreciation. It's more about the gesture than the actual item."

Person 2: "Okay, I see. And then we start asking questions to get them into a good state of mind?"

Person 1: "Exactly. We want to make sure they're happy and see if there's anything else we can do to over deliver and help them. Then we ask them about what's been the most helpful thing so far in the program and what they're most excited about. We want to get them talking and feeling positive about their experience."

Person 2: "That makes sense. And I'm assuming we only ask for a referral if they're happy with our service?"

Person 1: "Yes, that's correct. We want to make sure they're satisfied before we ask for a referral. And even then, we want to approach it in a way that doesn't make them feel pressured or obligated."

Person 1: And then they start talking about what they're most excited about. Not, Hey, are you excited or no, it's like, what has you the most excited?

Person 2: So you mean we should start the conversation by asking them what they're most excited about, instead of asking if they're excited?

Person 1: Exactly, it's a better way to get them thinking about what they're really looking forward to.

Person 2: That makes sense. And then we ask them to tell us more about what specifically excites them?

Person 1: Yes, exactly. We want to get them talking about what they love and what they're looking forward to.

Person 2: Okay, and then we ask them about their biggest aha moment so far?

Person 1: Yes, that's another good question to get them thinking about their experience.

Person 2: And then we should make sure we focus on the positive throughout the conversation, right?

Person 1: Yes, we want to make sure they're talking about all the things they love about our program or service.

Person 2: Got it. And at the end of the call, we should summarize all the positive things they said and repeat it back to them?

Person 1: Yes, that way they feel heard and appreciated.

Person 2: And then we can mention our referral program and ask if they want to hear more about it?

Person 1: Exactly, but we want to make sure we're not pressuring them into anything. We're just letting them know about the program and if they're interested, we'll explain how it works.

Person 2: And we should ask for names of people they think might be interested in our program?

Person 1: Yes, that way we can follow up with those people later and it's easier for them to give us names than to make an introduction right away.

Person 2: I see. And then we can explain how the referral program works and send them a text template to use?

Person 1: Yes, it's a simple process and we want to make it easy for them to refer people to us.

Person 1: So, basically, we send a text to our client's friend introducing ourselves and telling them what we do. This creates an authority frame for us, and it's a value add for the friend. We wait for the friend to respond first, ideally, and if they don't, we send another message saying, "Hey, no worries, but we'd love to connect with you. Would you be available for a quick five-minute call? I'm available at this time or this time." Then we wait for them to respond, and if they don't, we call them out of the blue and do a typical set call. And we keep asking for more referrals.

Person 2: That sounds simple enough. How do we send the text intro to the client's friend?

Person 1: We text the intro to our client on the call and explain how to fill it out. They just need to put their friend's name in. It should already be filled out at the time we send it to them. Then, we walk them through the process of actually text-introing us to all the names they gave us.

Person 2: Okay, got it. And if they referred us in the past, we can tweak the messaging a little bit?

Person 1: Yeah, exactly. We don't need to be as scripted out in that case because they've already referred people. And remember, we need to set a time where we're going to call every single lead, so we don't do this by the seat of our pants. We should say, "Hey, at the two-week mark, I'm calling every single lead." Anytime there's a client win, make it a habit to call them immediately and close them on referring more people. And if a client's unhappy, make it a habit to call them, resolve the situation, and ask for more referrals.