Increasing Your Odds of Referral

It isn't always easy to get current customers to introduce you. Let's increase our likelihood of success.

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Introduction

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Summary

Introduction

How will you meet new people within your customer organizations?

When this question gets asked, about 95% of the answers are some version of this:

I'll ask my primary contact to get me a meeting. We're on good terms. It will be easy.

Unfortunately, it doesn't always go like that. How we ask and what we ask can have a big impact on our chances of success. This course can't guarantee a meeting, but it will increase your odds of getting one. We'll learn:

- Why this task fails, even if we think it will be easy
- How to execute the highest-percentage ask
- Examples that you can use, if you like

CONTINUE

Lesson 2 of 5

Why It Doesn't Work

We tend to see three main reasons why we fail to meet new people in our customer organizations:

We're Afraid to Ask

It sounds something like "I don't want to..."

• rock the boat.

• lose what I have.

• make things complicated

• look greedy

However it comes out, this is a self-limiting belief that gets in the way of us even asking, in the first place.

We Don't Do The Work

When we do ask, it's often in a way that is non-commital and unspecific. In these moments, it's easy for our prospect to agree, but not follow through. They mean well, and in the moment they believe they will. However, when the ask amounts to "someone, someday" it's easy to see why it doesn't ever happen.

We Become The Threat

When we do ask, we become the threat. This might seem strange to think, especially where we enjoy a good relationship with the person we're asking. But to them, they are currently in a state of being where their colleague is not upset at them for anything. You represent a potential harm to that. Their primitive brain is wired to shut down the request, at first.

Let's see what we can do about these.

CONTINUE

What To Do, Instead

We've seen why referrals are hard to get. Sometimes, we're afraid to ask. When we do ask, we often do so without having done the work to get specific. And, when we do ask, we become a primitive brain threat to our prospect.

Let's tackle each of these problems, right now.

Commit to Asking

Our first roadblock is the easiest one to overcome. We must make a plan and commit to asking. If you don't already, begin tracking your own account growth numbers. Not just revenue, but also how many referrals you ask for, how many you get, and how effective your conversations are at every step.

Get Specific

There are several pieces of information we must give to increase our odds of success. A good referral request has these parts:

1. **Who you want to meet:** The best referral chance is to ask for the person you want to meet with, by name. If you don't know who it is, then do the

research. LinkedIn and lead software are your friend, here.

2. **What you want from your contact:** In most cases, we are seeking a simple introduction. If so, call it that. Don't use the word "referral." If it's something more you need from them, tell them up front.

3. **How you want it to happen:** It's much easier for someone to follow through with a task when they are able to envision actually doing it. Tell them if you want to do things via email, a drop-by, a call, or whatever other medium you think is best.

4. **What will happen afterward:** When they know what is expected of them, they are more likely to follow through. What will their involvement be, after they've done what you asked of them?

Sell the Introduction, Not the Solution

The best way to get through the primitive brain's initial negative reaction is to sell the introduction. Specifically, what's in it for them if they do what you ask? How will you make things better?

Many sellers attempt to answer this with the benefits of the solution they want to pitch, but this can be a mistake. Instead, focus on what it will mean for the person you're asking to follow through.

Now that we have a general framework, let's see some examples:

CONTINUE

Examples

Pro Tip

Framing a referral request as a request for "help" tends to increase the odds. It's also a nice way to begin the conversation in a way that acknowledges a future request, but does so in a way that (hopefully) makes them lean into, and want to comply with.

Now, some examples.

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Situation

You've done the research and pinpointed Kate as the person you want to talk to. Everything is in place. It's just time to ask your contact. You send them an email specifically about the introduction.

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Example Request

Hey, Jason, I know we don’t work in compliance together, but we're doing some great things with it. I think your colleague, Kate Williams, would really appreciate seeing how we’ve helped other folks in her position speed that process up. Could you give me a hand by introducing us so I can set something up? Just a quick email with the three of us would be great. You can be as involved as you want after we connect. I really think she’ll like what we have to show her.

Why it works

This has all four elements: it asks for someone by name, details the medium, is specific with the ask , and tells Jason what will happen afterward.

It also sells the introduction (Kate will like comparing her tasks with others like her) and uses a request for help (give me a hand).

Situation

You've done some research, but you aren't certain that you know who you want to speak to.
You're wrapping up a call with your contact.

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Example Request

Before we hang up, I was hoping you could help me. I'd like to find out if there might be some ways we can make compliance easier on you guys, but I know that's not your area to manage.

Should I talk to Kate Williams about that, or is there someone else that would be better?

Why it works

We begin with a broad request for help, here. Offering up a name helps our contact quickly sort through your request and arrive at an answer. It offers an initial, binary choice (Kate vs. anyone else) that's easier to answer than "Who is this."

In this example, we would want to follow up, after the answer, with the details of our request, in terms of what medium we want to use and what our expectations are. Something like:

"Great, thanks. Would it be possible for you to introduce us, just start an email thread with the three of us later today? I'll take it from there and drop you off of it, if you want."

Situation

You've been working with this customer for a while and have a great relationship with your contact. You've been hesitant to reach out to Kate, who you know is the right contact, because you don't want to "rock the boat" with this account. You're about to leave their meeting room after another good meeting.

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Example Request

Before I go, I wanted to give you a heads-up that I'm planning on reaching out to Kate Williams over in compliance to see if we can help make that easier for her. Do you want me to copy you on that, or would you rather I don't loop you into that?

Why it works

This is a strategy that helps remove you as a threat, to some degree. Since you're informing them, instead of asking permission, their own responsibility for your interaction with Kate is removed. Put another way: If Kate doesn't like you, it's not their fault.

However, this strategy also may not work as well with Kate, since you're cold-calling her without the introduction. Consider using this strategy, knowing the pros and cons.

Borrow elements from these examples, or write your own!

CONTINUE

Summary

Congratulations!

You've successfully completed this course.

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