

Let's Do Lunch

INVITATION AND CONVERSATION GUIDE TO CLIENT LUNCHES

In a relational (WBR) business, one of the most important ways you build relationships with somebody is by breaking bread with them.

Usually people learning to work by referral love this idea but it may feel a little awkward getting started.

Here are some tips to help you feel confident:

Before:

- Call to connect relationally and invite them to lunch.
- Keep your call short. (If you don't, there's no reason to go.)
- Have a place in mind but be flexible.

1 SAMPLE INVITATION DIALOGUE

"Hi John, this is Mary. It's been ages since we talked! I was just thinking about you and thought I'd give you a call to see if I could take you to lunch so we can catch up. Would Friday work for you?"

2 SAMPLE INVITATION DIALOGUE

"Hi Tom, Dennis here. Hey, I was just thinking about you the other day and wanted to know if you want to go grab a bite to eat this week? Friday looks good to me. Would that work?"

3 SAMPLE INVITATION DIALOGUE

"Hi Penny, it's Greg. How are you doing? It's been such a long time since we've gotten together. How is Sarah doing in soccer? What would it take for me to get some time to take you out to lunch?"

TIP:

- Have a few conversation topics ready. You can choose a few from The Client Connection List.



During:

- Be conversational.
- Listen to your client's interests, wants and needs.
- Ask questions and mirror back what they say so they know you're listening and connecting with them.
- Don't forget to ask for a referral!

Here are some easy ways to ask:

- “Oh, by the way...if you know of someone who would appreciate the level of service I provide, please call me with their name and business number. I'll be happy to follow up and take great care of them.”
- “Could you do me a favor? If you hear of anyone who is interested in buying or selling a home, can you keep me in mind?”
- “I've really enjoyed visiting with you today. If any of your friends or family members express an interest in buying or selling a home, it would be an honor to work with them. Just give me a call and I'll be happy to follow up.”
- “Oh, by the way...I'm never too busy for any of your referrals!”

TIP:

- You want to develop business relationships, so avoid being too casual in your conversation.

After:

- Immediately after meeting for lunch, record in your CRM anything special you learned about your client. (This will be a huge help for future conversations you have with this client.)
- Write a personal note.
- Look for opportunities to fill a need based on your conversation at lunch.

