

## Let's Do Lunch

### INVITATION AND CONVERSATION GUIDE TO CLIENT LUNCHES

**In a relational 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. Does Friday work?"

#### 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 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** on Blitz Central.



## Let's Do Lunch (continued)

### 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.

