



ASKING FOR REFERRALS

WHY, WHO, WHEN & HOW



Why Ask for Referrals?

Referrals are a cost-effective way to build your business. Generally, they have a higher closing ratio than other types of leads.

Who Can You Ask?

Referrals can come from clients, as well as your own friends and family. You can also ask clients to invite their friends and family to get in touch with you.

When Can You Ask for a Referral?



During an Appointment



Following an Appointment



Any time you speak with a client on the phone

Ways to Ask for Referrals

Business Cards

Give the client business cards with your contact info to pass along to friends and family.

Book of Business

Call your current book of business to review their products, then ask if they know anyone else who could use your help.

Referral Cards

Hand out referral cards with a “referred by” line, and handwrite your client’s name in the space.

Handwritten Note

Send a handwritten follow-up note after the appointment and include extra business cards.

Make Professional Contacts

Build relationships with organizations that serve senior citizens and become their source for information & referrals.

Call to Action

Include a call-to-action requesting referrals in your email signature.

Need More Information?

Contact your Sales Development Manager to discuss referrals and other lead generation techniques, and learn more about how our Marketing Assistance Program can help you offset the cost of marketing materials.

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