

Must-Do Tips No 45: The Holy Grail of Referrals

Cross selling appears so often in the canon of professional service wish-lists. Debated, talked about, written in, and with unerring frequency missed out on - it rarely makes it to a firm's list of big achievements. Why? Well, most often cross selling depends upon the ability of our professionals to generate referrals from their client contacts. And thereby hangs the main problem. Most of them don't (dare) do it. Yet if we can create just a few advocates for doing it successfully, the opportunities will multiply and all that investment in doing excellent work for clients generates real returns. This month three tips to encourage your professionals to grasp the referral grail.

Tip 1 - The right conditions

Happy clients with whom we have a good track record are potentially predisposed to recommend us elsewhere. Clients who are newer to the firm, or who have a neutral or less than happy view of us, are most often not. So first, we need to ascertain which contacts fall into the positive category.

Tip 2 - Use your knowledge

Knowing enough about the client's business - what is happening in other divisions or subsidiaries etc. - enables us to assess whether there are sufficient referral opportunities relevant to the firm's service offering. Likewise, a knowledge of individual client contacts - in particular, the quality and quantity of their internal and external networks - should dictate who we choose to ask.

Tip 3 - Just ask!..& choose the moment

Wouldn't it be nice if **all** our clients gave us referrals **all** the time? Nice, but unrealistic. Even the most satisfied clients will not refer us automatically most of the time. But often they will - *if asked*. So do it! And almost any occasion will do for popping the question to those who meet our criteria e.g. during a meeting, at a social event. The really good relationship developers make full use of the 'feel good' moments that come their way - at the conclusion of a successful deal, as part of a positive client review meeting - to enhance the chances of success.

People Scope works with firms to help their professionals cross sell. To know more, hit 'Reply' and type **Holy Grail**.

Of course you could always:

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Best regards.

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