IPO

DEVELOPING A POSITIVE REFERRAL MINDSET

Reframe referrals as valuable introductions, emphasizing the meaningful connections they create.
Embrace a supportive and collaborative attitude, focusing on the mutual benefits of referrals for both parties involved.

I-IMPROVE

SETTING THE STAGE FOR REFERRALS

- Ask clients for feedback on how you can improve your services.
- Express your desire to be the best financial advisors, both locally and nationally.
- Listen attentively to client suggestions and implement them when appropriate.
- Recognize that when clients are put on the spot, they often recognize the value you provide.

"Your satisfaction and experience as my client mean the world to me. I always strive to provide the best possible service. Is there anything I can do better to enhance your experience working with me?"

"My goal is to exceed your expectations and deliver unparalleled financial advisory services. If there's anything you believe I can improve upon to make your experience even more exceptional, please let me know."

P-PRAISE

HIGHLIGHTING CLIENT QUALITIES

- Identify and praise qualities in your clients that you genuinely appreciate.
- Emphasize qualities that can be found in others, helping clients see themselves in potential referrals.
- Personalize the praise by highlighting specific characteristics related to their professional roles or business ownership.
- Reinforce the positive client-advisor relationship and the value they bring to your practice.

"I wanted to take a moment to express how grateful I am to work with clients like you. Your openness to new ideas, your trust in my expertise, and your commitment to achieving your financial goals are qualities that make our partnership truly enjoyable and rewarding."

"Working with clients who are as dedicated and engaged as you are is a privilege. Your proactive approach to implementing financial advice and your willingness to collaborate make our working relationship truly exceptional."

O-OFFER

TURNING THE RADAR ON

- Encourage clients to keep their "radar on" for individuals who resemble them.
- Shift the focus from immediate referrals to creating awareness and identification of potential matches.
- Offer availability and commitment to assist and provide services to referrals.
- Emphasize the collaborative aspect by mentioning the goal of helping others together.

"While I don't expect you to have specific names in mind right now, I value your opinion and trust your judgment. If you come across individuals in your network who might benefit from the same level of care and attention, please feel free to introduce us. I'm committed to providing them with the same excellent service I strive to deliver to you."

"I appreciate your trust and support as my client. If you encounter someone who shares your values and could benefit from the financial guidance I provide, please don't hesitate to let me know. Your referrals are always welcomed, and I'm here to ensure they receive the best possible service."