 

**9/10’s referral strategy**

You can never underestimate the power of implied endorsement to get more lead referrals more easily. This strategy of contacting your own sphere of influence to get their opinion and rating on their experiences with their various business providers. This is a painless way to stay in touch, stay top of mind, secure top rated business vendor services for your own clients and customers, and create a consistent funnel of referrals. It’s a win-win when you tap into the relational capital of your own circle of business contacts, friends, and family to help others secure highly recommended services and create profitable reciprocity of business services.

In a simple short phone call --you ask for the other person’s rating or opinion on their experiences with their present service providers so you can refer them to your own prospects and contacts who need a better service experience. When their rating is higher than a 9 or a 10, you ask permission to call that provider and inquire if they have interest in getting new prospects from you. It is then easy to ask them to return the favor with referrals for you should they need a realtor or loan professional. The key is to keep ***accountability*** as you continue to exchange referral leads by scheduling regular, consistent follow up. If you are low on prospects, this strategy is a superb way to stay in contact and get new prospects.

**Script for Professionals**

**Collecting 9/10’s ratings -Change the verbiage for attorneys, CPAs, Accountants, etc.**

**Script: This script was designed for Accountants. Change the verbiage to fit attorney’s CPAs, CFPs, etc.)**

Hi, my name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I am a (Realtor) (mortgage professional) in the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_area. Is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ available? \*\*\*\* (insert if referral) I was given your name by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

I have come to notice that many of my clients either don’t have their own \_\_\_\_\_\_\_\_\_\_\_\_\_ (accountant, etc. or don’t rate the one they have very highly.

My goal here today is to find a qualified (ACCOUNTANT) to recommend to my clients. You see, many times people look to refinance or purchase properties, buy or sell investment properties, or alter the structure of real estate financing without properly understanding the tax implications of these actions.

My need is for an accountant that can clearly explain these implications so that they can fully understand the actions they are about to take.

Would it be possible for us to schedule an appointment on \_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_ so I can discuss with you how best to refer my clients to you and pick up a handful of your cards?

***IF THE PROFESSIONAL IS NOT INTERESTED IN A REFERRAL PROGRAM:***   
***SCRIPT:***

If you are not interested in my referral business, could you recommend an accountant that would be? Thank you for the referral.

***Close:***

Thank you so much for your time. I look forward to meeting you.

