



# 10 Step Referral Process

Your key to achieving more referrals

A presentation for The Worcestershire Business Breakfast Club  
from

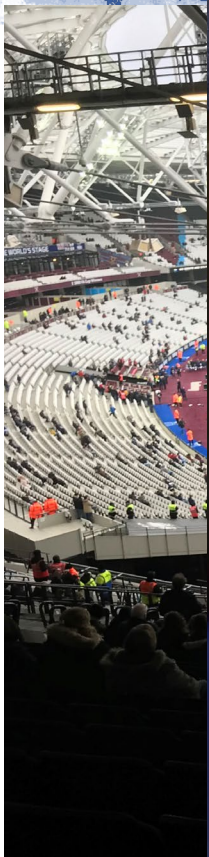
John Painter

# John Painter

- Former Managing Partner of CB, Chartered Accountants
- Consultant to Haines Watts in Worcester
- Principal of Worcester Business Advice
- Mindshop Expert for 17 years.
- Ambassador for Governance and Policy for the Institute of Directors, Worcestershire and The Marches
- Three Passions

# Business





Worcester



# Family



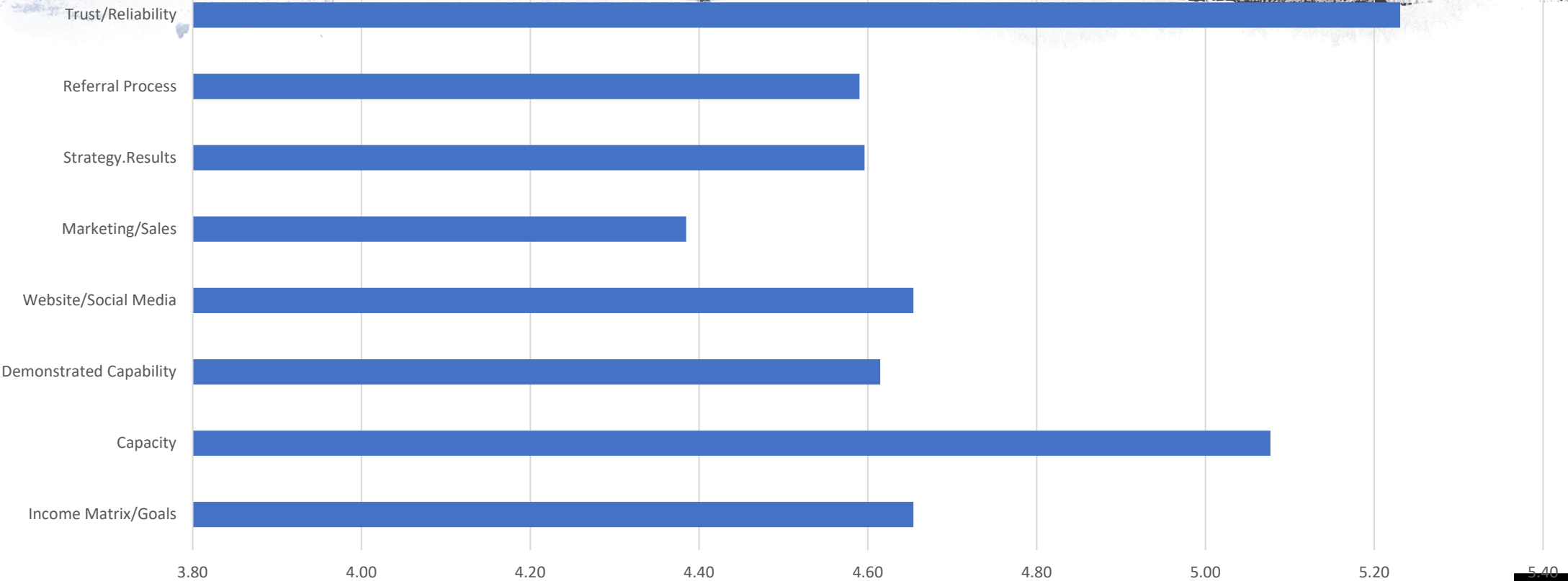
# 10 Step Referral Process

1. Create a profile of your best client
2. Are you referable?
3. Proof of capability
4. Accountability
5. Profile your Perfect prospect
6. Who will you ask for referrals
7. Create your Ask Script
8. Create a profile for your “introducer” to introduce you with
9. Create a Thank you system
10. Maintain a Book of Referrals

# Create a profile of your best client

- What does your best client look like
- What are the benefits that you bring to them

# Are you referable?





# Proof of capability

- What evidence do you have that demonstrates your ability?
- Website
- Testimonials
- Videos

# Accountability

- Who will monitor referrals
- How will they be measured

# Profile your Perfect Prospect

- Write a short paragraph describing them

# Who will you ask for referrals?

- List them
- What category do they fall into

# Create your “ask” script

Our business is built on the strength of our relationships so we value recommendations very highly. If you have anyone in mind who would you think would benefit from our work or simply get some advice we would love the introduction.

Ask outright for the client to send you a referral

# Create a profile for your “introducer” to introduce you with

- **REFERERS BRIEFING SHEET**

- NAME .....

- **CONTACT DETAILS**

- Email: .....

- Website/Landing Page: .....

- Contact Phone Number: .....

# Create a profile for your “introducer” to introduce you with

- **VALUE PROPOSITION**

- Why refer me
- What I do
- Proof of capability
- Successful engagements

- What you could say about me
- How I will engage with the prospect
- What my ideal client looks like
- How you can help me
- Your plan for helping me
- How I could help you?

# Create a Thank You system

- How will you demonstrate your thanks?



# Maintain a book of referrals

- Why?
- What will you do with it?

# 10 Step Referral Process

1. Create a profile of your best client
2. Are you referable?
3. Proof of capability
4. Accountability
5. Profile your Perfect prospect
6. Who will you ask for referrals
7. Create your Ask Script
8. Create a profile for your “introducer” to introduce you with
9. Create a Thank you system
10. Maintain a Book of Referrals

# Thank you and Questions

John Painter

Worcester Business Advice

07785 268442

[www.worcesterbusinessadvice.co.uk](http://www.worcesterbusinessadvice.co.uk)

[john@worcesterbusinessadvice.co.uk](mailto:john@worcesterbusinessadvice.co.uk)