

Sales Referral Worksheet

Ask Yourself - what is holding me back:

Feel Awkward

Fear Rejection

Identify why you are feeling this way. What's the root cause that's holding you back. Then run through the worst case, best case, and most likely case scenarios you so can move forward.

Don't Deserve the Referral

Is it because you have not truly earned it? You or your organization have not given the client a delightful experience? If so, you need to fill the gaps and address the client pain points to provide outstanding service and/or product.

If you don't feel you have deserved it due to Impostor Syndrome – invest two hours in our free course: [Overcome Impostor Syndrome in 7 Easy Habits](#)

Not Part of Current Sales Process

Make it your priority to fix this!

Incorporate Referrals into your sales process.

Asking for a referral is not a question of asking for it too soon. Rather, it should be part of your sales process DNA.

Rapport Building Stage: Plant the seeds for a future referral.

Example: You know, it is so wonderful working with you. So many of my clients are referrals, and I don't usually get to have this kind of rapport with someone I've just met.

Your Statement:

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Decision-Making Stage: Fertilize your referral seeds.

Example: I'm super happy that you are now part of my network. And just so you know, everyone in my network, whether they start out as you or were referred to me, gets the same laser focus on your specific needs.

Your Statement:

After the Sale Stage:

Example: Do you know anyone in your world you can use my service? Please don't hesitate to send them my way. They will receive the same level of care and attention you have received.

Your Statement:

Tips when composing your referral statements:

- Frame your referral requests by focusing on the product or service you provide.
- Include who you serve, your ideal client, and the core benefits of your service.
- Provide direction in how your clients can provide you with referrals.
- Make it easy for your clients to provide you with the introduction.
- Practice asking for referrals and planting the referral seeds.
- Always thank, recognize, and reward every referral.