



ANALYSE CREATE MOTIVATE

VUE by referral

An Australian referral solution

Referrals are the main business driver in most Professional Services firms yet they are often treated as an after-thought, limited to a throw-away line while walking a client to the door. Many advisers are somewhat fearful of “harming” a good client relationship while other advisers may raise the topic, but get no result.

There is a solution. Vue Consulting’s **By Referral** is designed to help you create an easy, comfortable and ethical referral process.

This practical training suits any Professional Services adviser and moves beyond simple inter-personal skills and into Business Development outcomes. The end result is a tangible process which helps your business boost its referral capabilities

Forget any pushy, direct or intrusive referral tactic you were taught 30 years ago or from a text book. Learn how to conduct comfortable referral discussions to promote natural, high quality referrals and how to build a complete, repeatable referral process in your business.



By Referral will help you...

Understand how genuine client referrals occur and how you can assist clients in this process. Build a repeatable referral process with supporting tools.

- Overcome referral fears
- Know when to discuss referrals
- Improve the quality of referrals
- Build client referral materials
- Design a tangible solution
- Obtain introductions, not leads
- Utilise various referral seeds
- Create a repeatable process
- Increase number of referrals
- Avoid high pressure tactics

Comfortable
Effective
Systematic

Referral

In sales, a referral is the key to the door of resistance.

Bo Bennett

By Referral Workshop Agenda...

CREATE

Vue Consulting's Learning Methodology is called ANALYSE CREATE MOTIVATE, representing the before, during and after stages of a training experience.

The CREATE phase includes our Workshops and face-to-face learning. **By Referral's** CREATE phase requires the equivalent of a full day of Workshop time. This can be held as either a single full day or two half days held a month apart.

The Workshop Agenda itself, covers the following modules...

Part 1 - Comfortable Discussions

- Understanding referrals and the client referral process
- Clarifying your ideal referrals and how to present this to clients
- Conducting (and practising) comfortable client discussions
- Obtaining personal introductions to client referrals

Part 2 - Effective Process

- Refining, enhancing and practising your complete client discussions
- Adding in Referral Seeds to support your referral process
- Designing a complete Referral Process, including case studies

NB: *By Referral* is purely focused on Client Referrals. It does not address Centre of Influence relationships or Joint Ventures.

ANALYSE MOTIVATE

See the Vue Consulting brochure for more details on the ANALYSE and MOTIVATE phases of our training.



ANALYSE CREATE MOTIVATE

By Referral is particularly suitable for practices or advisers with...

Fears of looking desperate

You will learn how to discuss referrals with clients in a positive, natural manner (what we call "abundance").

Staff needing a single approach

You will build your own referral process, right into your own client experience - with templates, feedback and case studies to review - useable by all staff.

Multiple business lines or services

You will create ways to educate clients about the full range of services you provide and situations you can help to improve both quality and quantity of referrals.

A focus on quality referrals

You will clarify who you want to be referred to and develop methods to better educate clients on the ideal referrals you are seeking.

A worry about being pushy

You will create your own referral language, from over 20 examples, to suit your own style. You will also receive significant peer feedback on your approach. You will also learn how to work with clients, rather than push them into a corner.

Limited marketing options

You will examine additional referral marketing options including referral "seeds", referral mail-outs and referral rewards, to boost your referral volume.

Desire for a total solution

You will receive templates, scripts, example handouts, checklists, cheat-sheets, peer feedback, case studies and email coaching.