

Guardian U

Conversation Template

Asking for Introductions

Use this general structure to develop your personal approach for the Introductions conversation.

Step	Purpose	Your Approach
Experience	Ask about and affirm the client's positive experience	
Connect	Connect the client's experience to others/ refer to how you and client were introduced	
Brainstorm	Ask permission to brainstorm and get the client thinking about names	
Prompt	Prompt with a feeder list, client profile, or names from a previous conversation	
Qualify	Review list and learn more about potential contacts	
Communicate	For each contact, decide the best way to communicate Thank the client for providing names	