








## Quick Card

# Build Your Practice with Introductions

<b>What?</b>	Introductions are warm leads from people you know – friends, clients and centers of influence. Introductions help you generate activity and create a sustainable pipeline of new people to see.		
<b>Why?</b>	Introductions expand your relationship inventory exponentially by giving you access to each of your contact’s key relationships.		
<b>What does it take?</b>		<ul style="list-style-type: none"> <li>• <b>10 new names</b> of potential clients per week.</li> <li>• <b>At least 2 introductions meetings</b> per week.</li> </ul> Make an introductions commitment today!	
<b>How? The Approach</b>	 <b>Experience</b>	Ask about and affirm the client’s positive experience.	“We’ve covered a lot of different items today.” “Tell me, of the items that we covered today what did you like most? Or what stuck out to you most?”
	 <b>Connect</b>	Connect the client’s experience to others/ refer to how you and the client were introduced.	“Think about what you’ve just learned. You’re not alone.”
	 <b>Brainstorm</b>	Ask permission to brainstorm and get the client thinking about names.	“Would you be open to brainstorming?” “Who else in your world that you care about personally or respect professionally do you think would get value from similar education?”
	 <b>Prompt</b>	Prompt with a feeder list, client profile, or names from a previous conversation.	“Let’s go through this list and see if there’s anybody on here that you think would benefit from the same opportunity that you and your family just had.”
	 <b>Qualify</b>	Review list and learn more about potential contacts.	“How do you know (name)?” “What’s important to them?” “Is there anyone we should cross off?”
	 <b>Communicate</b>	Decide how to communicate with each contact. Thank the client for providing names.	“If you were __, what would be the best way to connect? Do you think they would prefer you sending an email and cc-ing me, would they prefer a letter...?” “Thank- you for helping me connect with these people.”

## How? The Process

Having a repeatable process with simple, templated steps will make it more likely that you stick to your commitments and remember to ask for introductions at every opportunity.



## Tips

**Sounding natural:** A good way to help yourself sound natural is "bulletize" your script: write it out, read it aloud, then once you are comfortable rewrite the script as bulleted phrases. This will help you "talk" the ideas but keep you on track.

**Be specific:** Give some ideas to start the brainstorming.

- **Specific names:** "You mentioned \_\_\_\_, let's start there..."
- **Categories of names:** "You're on the board of \_\_\_\_. Who in that group should I meet?"
- **Ideal client profile:** "Here's a profile of the type of people I serve best..."
- **Feed list:** (e.g. LinkedIn) "I did a little homework because I know it's hard to think of names."

**Use an Agenda:** Put the words "Introductions" or "Expectations" on your meeting agenda. This will trigger the discussion of client's experience and open the door to requesting introductions.

**Don't stop at one name:** When someone gives you one introduction, they are typically willing to give you more. They just likely need some help brainstorming additional people.

"When thinking about other people like \_\_\_\_, who else comes to mind?"

**Handling objections:** Ask a question to find out more about the issue. For example:

- "I'm not comfortable giving introductions" → "May I ask why not?"
- "I can't think of anyone" → "That's fine. We're just brainstorming here. I did a bit of homework because I know it's hard to think of people."

**When and how to back off:** A good rule of thumb is after two objections – you plant a seed for a future discussion and then back out.

"I completely understand. All I ask is that when you're in a conversation with a friend or colleague, and you think they could benefit from the work I do, don't keep me a secret. OK?"

## Key Reference

Introductions Playbook

**Guardian U >> Market development >> Build your practice with introductions**