



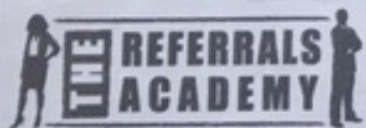
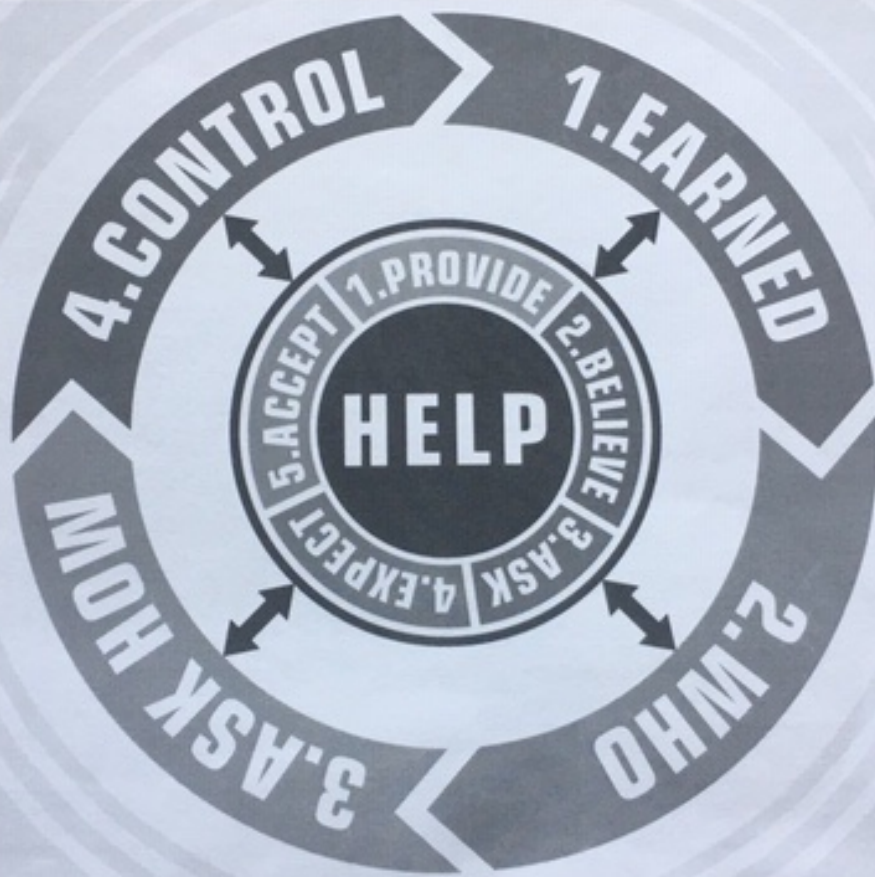
# Getting Referrals in a Virtual Networking World

XPX New Jersey July 2020  
Matt Anderson

*“The point is to give them more. You give, give, give. Why? Because you love to. **It’s not a strategy, it’s a way of life.** And when you do, then very, very profitable things begin to happen.”*

*- Bob Burg, The Go-Giver*

# THE 4 STEP FEARLESS REFERRAL SYSTEM™



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## 1:1 Relationship Meeting Sheet

**WHO:** \_\_\_\_\_ **Referral Source:** \_\_\_\_\_.

**WHEN:** \_\_\_\_\_ **Birthday:** \_\_\_\_\_.

1. Key Info: (kids, passions, common ground)

2. What type of planning/work do you do with your clients? (use back)

3. WANTS TO MEET/TYPE OF BIZ YOU'RE MOST LOOKING FOR? Network Strengths?

Also: 4. Which professionals typically refer you the most business? 5. Where do you get your business?

What do you need help with right now? (HOW CAN I HELP THIS PERSON **MOST?**)

6. What else are you hoping to accomplish this year?

7. How have you worked with (people in your vocation) in the past?

I'VE ASKED THESE PEOPLE IF THEY'RE INTERESTED.....DATE OF REQUEST:

I INTRODUCED THEM TO..... ON XYZ DATE.

Intros/value Received

8. Do you mind if I tell you a little more about what I do?



## The Four Step Fearless Referral System: Matt Anderson

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Here is a system for you that makes it easy to remember the four crucial parts to the referral process. It applies to ALL the people you know.

Before expecting great results with the four steps, you want to understand what's at the HEART of getting referrals. **These five things reinforce each of the four steps throughout the process and will make you much more comfortable asking for referrals – which is most people's biggest obstacle.** The steps all revolve around the Circle of HELP.

### 1. I PROVIDE as much HELP as I can to others

First, you have to HELP others get what they want as best you can whenever you get the chance. *This is a way of living* not a 'strategy' or technique to get what you want.

### 2. I increasingly BELIEVE in my heart that I'm just sincerely trying to HELP people

**You want to build the core belief that you're just sincerely trying to help people.** The more you believe you are genuinely helping others, the easier it is to ask for what you want because you believe you've earned it and you will do everything you can to make your referral source look good.

**This belief is the most important mental shift that you need in order to ask effectively for referrals** (also so you stop focusing your thoughts on the concerns you have about asking).

### 3. I ASK for HELP because it is essential to do so in order to help more people

Many people in business development are afraid that asking for referrals will make them look needy, pushy, foolish, or spoil a relationship. High achievers, on the other hand, know that asking for what you want is a crucial step to success and are able to get past these insecurities. They know that you can't get to the top on your own.

### 4. I increasingly EXPECT HELP from others and to get ever better business opportunities

Think for a moment about someone you're really close to. Then think about asking him or her for a favour. You ask with plenty of confidence and you generally expect them to say yes, don't you? This is how you want to approach your referral requests even if you feel like there's a little acting going on at times: ask people with an expectancy that they will say yes.

Also, expecting ever better opportunities to come your way is part of building an abundance mindset – of noticing that there is plenty to go around. This will help you grow beyond your comfort zone of introductions.

### 5. I increasingly ACCEPT HELP from others for ever better business opportunities



At the root of what limits us most is the belief that “I am not good enough”. We are *rarely conscious of this*, yet it limits:

- a) What we ask for - what we think we deserve to get for opportunities
- b) It also causes us to mess up some opportunities (especially bigger ones) when they come our way.

This is not for you! The most powerful thing you can start doing to improve your inner worth is to more consciously do your best at everything. Over time, this will build your self-respect, extend your boundaries for what you see as possible for yourself, and open you up to ever more effective ways to grow.

Now with these five mindsets and actions top of mind, you are ready to get more and better referrals for the rest of your professional life by implementing the four-step fearless referral system.

Memorise the following four steps, practice them until they become habits, and ask, ask, ask.

Earned  
Who  
Ask How  
Control

## 1. EARNED

You do not recommend someone who does average work and neither does anyone else. Statistically we have to concede that much of our work has to be average at least in the eyes of others – even if it seems incomprehensible that our work could ever be considered ‘average’.

You have to EARN the right to ask for a referral, exceed some expectation and/or have a strong emotional connection with the other person. There has to be water in the well in your relationship before anyone will be opening doors for you.

This is a grey area: people vary in how long it can take for them to trust others. There are a few people who are enthusiastic quickly and refer you early on. There are a few who can take years. Most people fall in the middle.

### **How do you know if you’ve earned it and can ask for a referral?**

Sometimes you can trust your gut on this: you sense that the other person knows, likes and trusts you. Sometimes you know from experience that you’ve done good work.

If you are uncertain about whether to ask, then **get some feedback from them**. This takes courage. The advantage to getting feedback is that you won’t shoot too soon and ask when the other person is not that impressed which makes the asking awkward. Most of what you hear will be complimentary!



Ask an open-ended question such as: “What have you found most helpful about the work we’ve done over the past (time period)?” You will hear in the *tone of their voice* whether they are genuinely pleased.

Now, if you want to get feedback on ways you can improve (and this is a great idea): “What else could I do that would help you more?” - you may put yourself in a position where you need to address their suggestions first before asking for a referral at a later date.

## 2. WHO

There’s a very good chance that many people have not referred you because they need your help identifying WHO you want to be introduced to. They’re not going to take a week off work to sort this out on their own!

**The most important thing about getting referrals is being so clear about what you want that the other person does not have to think about it.** It is *your* job to identify what (WHO) you want so that it is easy for others to help you. Never again say: “If you can think of anyone else that might benefit from my work, please have them give me a call.” This is not an ask; it is a throwaway line.

The question to ask yourself before every meeting is: What would I love to ask this person?

There are seven ways to come up with names:

- a) Pre-plan your ask based on past conversations or online research (e.g. LinkedIn)
- b) Listen for names of people mentioned who sound like good prospects and are people they like – **and write down these names!**
- c) Ask different questions to find out who is in their network
- d) Use generic specifics such as close friend, sibling, favourite client
- e) Tell stories of others you’ve helped in different situations
- f) Share a list of companies/prospects you’re looking to help or of very specific situations you’ve worked on recently
- g) Share highly specialised subject matter that only applies to a small number of people they know

## 3. ASK HOW

**Step 3 is where you actually ASK for the introduction. If you’ve earned it and know who you want to meet, all you really need to do is ASK HOW your referral source would be most comfortable introducing you.**

**A good referral is like sales: it is a transfer of enthusiasm from both you and your referral source.**

There’s a very good chance that many people have not referred you because they don’t know how to introduce you – and they’re not going to admit this to you.

Except for current referral sources, play it safe and assume the other person could use some direction in HOW best to introduce you – even if they tell you: “I’ll have a word with her.”





Craft language to share in an email that others can use too. The basics are always the same: “Julie’s great. Talk to her. Can she call you?”

Nowadays we spruce it up:

“Julie has done excellent work for me and my wife. She specializes in working with (fill in relevant scenario). I’m not sure how impressed you are with the (e.g.) financial planning that you’ve done in recent years, but we regard her highly. Would you be open to hearing from her some time?”

#### 4. CONTROL

There’s a very good chance that many people have not referred you because you left it up to them and they never got around to it.

You cannot expect other people to care about your business opportunities as much as you. They need your reminders.

##### a) **You must hold people accountable for their word.**

People hate to be inconsistent with things they have said they will do. Your job is to treat people’s word as if they are reciting some holy scripture. I know that sounds like a stretch but when you do this, the other person feels a greater obligation because they can sense its importance to you.

There are non-threatening ways to gently remind people of things they said and when they mentioned it: “I hope life is treating you well. When we had coffee on February 21<sup>st</sup>, you’d asked me to get back to you about (fill in the blank: working with your business partner, meeting up with Denise etc). Have you made any progress with that?” You can always re-coach the person using wording from the HOW step.

**b) You must be patient and persistent.** 60-80% of sales are closed after we ask for them 5 times or more. Most people give up after two requests. Track your follow up and spread it out. You don’t want to be a pest but, as importantly, you will want to remind yourself of the value you bring so you do persevere (see the first five mindsets and actions at the heart of referrals).

##### c) **Ask questions that help you keep control:**

“When should I get back to you to see if Denise is interested?”

“What’s a reasonable time frame for me to get back to you to see if Denise is interested in hearing from me?”

Don’t let people get away with: “Let me get back to you.” Let the conversation move on so it appears that you have acquiesced, but before you part ways, say: “If for some reason you just get really busy and I’ve not heard from you, when should I get back to you about Denise?”

##### d) **Detach from expecting quick results:**



Because our limiting beliefs tell us we are not really good enough, we have unrealistic expectations about when the results will come.

We are impatient. We plant the seeds but all we can think about is: Where are the results? Where are the results? Where are the results?

I truly empathise on this and know it can be very hard to do.

We need to detach and not worry when our seeds will flower; it may take a lot longer than you wish it would. But **have the faith that it will come back to you.**

If you truly want to get more and better referrals for the rest of your professional life, I repeat: **Incorporate the five actions and mindsets I mentioned first because they *reinforce each of the four steps throughout the process.***

**Then memorise: Earned, Who, Ask How and Control, practice them until they become habits and ask and ask and ask.**

Thank me later!

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\_\_\_ Please send me the link to your free video series: *3 Keys to More and Better Referrals*

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