



# If you don't ask, you don't get!

## How to generate more referrals from existing clients

The tips below are an extract from the notes of our business development course 'Delivering Service Excellence and Developing Client Advocacy'.

Referrals from existing clients continue to provide firms with their most valuable source of new business. Most of these referrals are provided by enthusiastic clients doing so proactively, without being asked. Many more referrals could be generated for firms, however, if they asked more of their clients directly to refer work to them. Recent research carried out into this area found that while 65% of SME clients would be highly likely to refer work to their accountants, only 6% had been asked directly to do so.

Reasons given as to why firms are reluctant to ask for referrals include the desire not to appear too 'pushy' or the risk of being perceived by their clients as being 'desperate' for work. However the evidence from those firms who do take advantage of these business development opportunities has shown this is not how clients regard being asked. As fellow business people clients recognise referrals are an essential ingredient in ensuring a steady flow of new work into their business.

So why not tap into this potentially lucrative source of new business and start asking your clients directly to refer new business contacts your way?

The tips below are intended to help you overcome the concerns you may have over asking for referrals and provide you with guidance on how to approach this element of your business development role with confidence and competence.

### **1 Don't assume they will refer you without being asked**

Don't assume your clients will automatically refer you to their friends or business contacts. Some will but most of them won't. Most of them have their own concerns in running their businesses or personal lives, so they are not automatically thinking about helping you to grow your business and get more clients. Providing you have delivered an excellent service, most of your clients will be happy to recommend you, it's just that it isn't uppermost in their minds....unless you ask them!

### **2 The best time to ask**

The best time to ask for referrals is directly after you have delivered an excellent service and

added value to their business. It is when this value is still fresh in their minds. This will significantly increase the likelihood of them agreeing to refer us. Make the asking of referrals part of your end of assignment routine. Many jobs end with a client meeting which is the best time to ask.

This is also the best time to ask them for testimonials. Don't expect them to come up with one on the spot; leave them a card or form they can use or ask them to email it to you.

### 3 How to ask

The best way to ask is to be polite, sincere and direct.

*The 'general ask':*

"I'm glad you are pleased with the work we have done for you. I'd really appreciate it if you could pass our/my details onto anyone else you know who would benefit from the services we provide for you. May I leave these business cards with you?"

Leaving business cards with your client makes it easier for them to pass on your contact details to others.

*The 'specific ask':*

"I'm glad you are pleased with the work we have done for you. We are always looking to help businesses like yours, who see their accountant as a valued/important part of their business. I wonder if you know anyone else who would benefit from the services we provide for you?"

If they provide names, take down the details and establish whether they would be happy for you to contact them or if they would prefer to pass your information on to the contact themselves. If they don't provide names, follow the route of the 'general ask' above.

The above approaches can be made even more specific by letting your client know the type of referral client you are looking for (eg industry sector, size, start-up, established, owner-managed, high-wealth, etc.) and the type of service you are looking to provide them with.

### 4 How not to ask

Avoid the 'vague ask', for example:

"If you hear of anyone who might need our services, I hope you will keep us in mind."

Whilst this is better than not asking at all, it does not create the clear picture of the businesses you would like referred to you nor what you are asking your client to do on your behalf.

### 5 Face-to-face works best

Asking for referrals works best when it is done face-to-face. It is more respectful of our clients and it is more successful. People are more likely to do something for you if you are in front of them.

For those clients that we don't meet face-to-face, asking for referrals by phone or email is acceptable, with the phone being preferable. Burying your request for referrals as part of a standard email signature or by a general request on your website is the least recommended route but it still beats not asking at all.

## **6 Don't be concerned about appearing pushy**

Many accountants are concerned they will appear 'pushy' by asking for referrals. Remember that most people like to help other people, so assuming you have helped them through your delivery of excellent service, you will not come across as pushy. They will understand that as a fellow business person, referrals are an important part of developing your business.

## **7 Take advantage of opportunities to refer business to them**

A great way of encouraging your clients to refer business to you is by referring business to them. This will significantly increase the likelihood of them referring business to you, especially if you have asked them to.

Think of your other clients and which ones may complement each other and then offer to introduce them or take them both to lunch etc.

## **8 What's the worst that can happen?**

Provided you have asked them for referrals in a polite and professional way, the worst thing that can happen is that the client says "No". That's not the end of the world or your relationship with them. At least then you can then move on to your next advocate who almost certainly will be happy to refer you to others.

If you have found these tips useful, our 'Delivering Service Excellence and Developing Client Advocacy', an open course is running in the Midlands on 22 November 2012 as part of our programme of Management and Business Development courses. It can also be held in house. To download the complete programme click [here](#).

If you are interested in learning more about how Mercia can help your firm make the most of business development opportunities, please contact our Director of Management Training, John Sharkey at [john.sharkey@mercia-group.co.uk](mailto:john.sharkey@mercia-group.co.uk). He would be delighted to hear from you.

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