

The Best Marketing Ideas for Now

Part Three - Enhancing Your Referral Business

I had a phone call from a very upset advisor. He told me he was on the verge of leaving the financial services business -- and sounded serious. I had trained him about 6 months ago and was concerned at how discouraged he sounded.

He had acquired 30 referrals in a short period of time. That's the good news. The bad news is that he had literally reached NO ONE on the list. All of the referring clients were happy to give him names and he dutifully followed up with what he thought was appropriate behavior. It's always disheartening when you think you're doing the right thing and not getting the right results.

I asked him if any of his clients had texted his contact information to the new people, adding a few sentences about him. He said no.

Now I knew where the problem was.

Just getting names and phone numbers simply won't work. In today's "no pick up culture" you need your clients to do **one more step** on your behalf. The best endorsement will now come via a text from your client with a brief note such as:

I'm extremely happy with my financial advisor, _____. I've attached her contact information. Make sure you save it in your phone. I told her to call you. Take her call. It will be worth 10 minutes of your time.

Your contact info is attached to these comments.

This method requires two things on your part TODAY. **One**, make sure you have created a "Self-Contact" in your phone. Your professional contact should have your First Name, Last Name and, on the third line, a description of what you do, using the word "Financial" in it. Don't put First, Last, Company. You want a *searchable word* that allows people to find you in their phones if they can't remember your name. Below that, fill in your office phone, cell phone, email address and physical address, which will include your company name on the first line (exclude your suite number since most phones allow you 4 lines for the address).

Two, practice texting your contact info to another person's phone. I am constantly shocked at how many people do not actually know how to text their contact information. You need this skill for every time you meet someone you want to follow up with. *And, you may need to do all of this texting for your client if they don't know how to text!*

This important change in your behavior - asking clients to text your contact information - can only happen if you religiously get into your clients' phones. It's not enough to give them a paper business card. You have to **be in their phones** so they can text your info to another person.

Back to the upset advisor: I suggested that he call, or visit, 5 of those referring clients and ask them to text his information so the new person would accept his calls. Even though he diligently made calls to the 30 referrals, none of them - and I mean ZERO - picked up or responded to his voice mails.

This story will continue because prospects will continue to ignore voice mails and calls that display only a phone number and not a **name and number**. Your prospects think the same as you do --"If you're not in my phone, then I don't know you and I don't want to talk to you."

Working within this new phone culture is different. You must keep asking for Introductions, not just referrals. And including the steps I've laid out are also important so you ultimately get to meet the new people your client recommends.

Remember, a name and a number isn't enough. A texted note and your contact information is now your "new normal".

Remember: Words Matter!

Gail

Intelligence is the ability to adapt to change.
Stephen Hawking