

# REFERRAL ASKING PROCESS CHECKLIST

EVERY STEP IS CRUCIAL IN THE REFERRAL ASKING PROCESS SO BE SURE TO COVER ALL THE STEPS!

- Upon the end of your meeting, explain to your client that it is a normal process for you to ask for your client's feedback.
- Ask for agreement for their help in giving feedback to the session.
- Flip the Client Feedback Form upwards, facing you, with half of the form flowing off the table.  
*Tip: Flip the form in a natural manner and ensure that your clients do not see the entire form. You may want to practice this step a couple of times!*
- Lean in and write your Client's name and your name.  
*Tip: Writing your Client's name on the form first ensures their full commitment in completing the feedback process.*
- Ask for today's date - divert your client's attention from the form with your hand (dominant/non-dominant) /touch your head  
*Tip: Diverting your client's attention is also known as a technique of misdirection. This prevents your clients from being too focused on you writing on the feedback form and being guarded with their responses to the form.*
- Probe further on the feedback given and ask for further elaboration of responses at open ended questions..

  - Put down your pen
  - Ask probing questions with open palms
  - Jot down their responses
  - Keep a conversation with your client
  - Pick out key vocabulary throughout the conversation
- Thank your client for their feedback
- Wrap up the client feedback portion

  - *Tip: Reiterate your professional practice through your Uniqueness, Differentiation and Intention.*
  - *Technique of contrast: The bigger the contrast, the bigger the appreciation.*
  - *"Help me to reach out to as many people as possible." (Referral Revolution Book, pp.115)*
- Ask Client if he/she have their phone with them.
- Ask them to open their WhatsApp

  - *"Please don't refer all your friends to me"*
  - *The people that I work with are normally:*
- Turn the form towards your client and Push the pen towards your client

  - *Tip: As you are doing so, keep talking to your client and reiterate your Uniqueness, Differentiation and Intention so that your client appreciates you more and are willing to give you more.*
- "Please Go Ahead" gesture to ask the person to start writing"
- Excuse yourself to go to the washroom as the client is filling it in.

  - *Tip: Leave a note of encouragement and praise to your clients about filling in.*
- Thank your client for the referrals and start your soft fact find with your client about the referrals that he/she has given you.

  - *Tip: Ask for the profile of the referrals and relationship of your clients*
- Assure your clients that you will extend the same professional practice to the referrals that you have received from them.