

The Win-Win-Win Approach

To begin to truly embrace a new way of looking at referrals, we need to believe and accept that everyone in the referral chain is a 'winner,' not just the advisor.

What's in it for your clients making the referral?

The messaging around the introduction process must speak to the client's payoff: what's in it for them – not *us*. It is positioned as a service and benefit to the client: help them help others and feel great about their day-to-day decisions.

We're sure they also enjoy the perks and privileges they receive because they're your AAA client.

What's in it for those who are introduced to you?

Equally important: we need to understand the payoff to the friend or family client who has been introduced to you. An introduction provides them with:

- Knowledge
- A respected opinion
- Freed-up time to do other things
- Value when introduced to a professional that is a good fit

When it comes to finding the services of a professional (especially one related to financial matters), the last thing most people want to do is rely on Google and/or set up a series of interviews with various Advisors. Instead, most individuals are inclined to ask those around them who they use and why. In other words, they prefer the easy way.

What's in it for you – the Advisor?

This is the obvious one – you benefit from having a new client which positively impacts your assets under management and revenues generated. However, this isn't the only intention behind WHY we have an introduction process. We do it because it's the right thing to do for our clients. And we've found if you approach it with that in mind you will generate better results.

Win-Win-Win

YOUR TOP CLIENT

Feel good helping others.

Like getting praise and thanks from others.

Enjoy the perks of being a AAA client.



YOUR NEW CLIENT

Save time and energy finding the right service provider.

Have a clear expectation of the process – familiarity.

Have more confidence they are making the right choice.



THE ADVISOR

Help a top client.

Gain a new client.

Grow their revenue.