

# Understanding the New Client Process

Our Proven Strategies involve attracting, not chasing, clients to you and the Credit Union/Organization. To explore this further, let's discuss a few key concepts:

You must first deserve a referral to receive one:

Create exceptional branding through an exceptional client **experience**

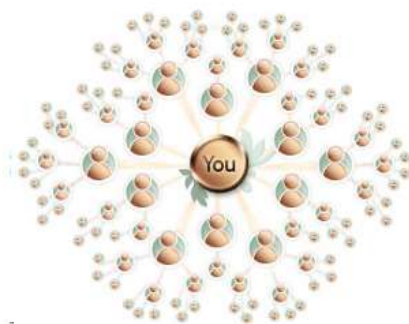
- First, bring them on the right way → **Your Client Onboarding**
- Second, service them exceptionally → **Your Client Experience**

## Where to Generate Referrals

- Credit Union/Organization Employees → **You have the benefit of internal referrals (this can include insurance and commercial lending)**
- Existing Clients
- Centers of Influence

## How to Generate Referrals

- Consistently position your Introduction Process
- Don't Ask – Educate
- Understanding Why Others Refer: Position yourself as a resource
- Reinforce your process regularly → **Review Meeting Process**
- Use a FIT Process



## Referrals:

The **FREE** and **EASY**  
way to get more  
customers!