

Partial List of Services

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[Six Ways to Ask for Referrals \[+ 2 Free Email Templates\]](#)

It's been said that the biggest indicator of a firm's success is what percentage of its clients are referrals. But why are referrals so valuable? Clients who are referred tend to spend more, be less price-sensitive, have fewer objections and be less risky. This article will explore the 6 steps to asking for a referral, as well as provide two sample referral emails you can send to your clients.

How to ask for a referral:

1. Be direct: This may be a bit of an oversimplification but putting a statement like "we like referrals" at the bottom of an email is not sufficient. This is entirely too passive and often overlooked by the reader. Instead you should directly ask your clients for referrals – either by email, online or in-person. Don't feel sheepish about asking for referrals; there's nothing pushy about it. People won't give you referrals unless you deserve them. In fact, getting a referral is the highest compliment you can receive.

2. Make it personal: When asking for a referral, don't send a broad message to a bunch of people. Reach out to each client directly – either by email, phone or online. This may be a bit tedious, but studies show that the response rate for personal requests is 41% higher than broad messages.

3. Be specific: A request for a referral taps into the memory reserve of your client. Studies show that the brain easily forgets information that is too broad or too overwhelming – but is more likely to recall information that is specific. Additionally, it's much easier for clients to recall one or two people that could use your help vs. "anyone" that could use your help. So when you ask a client for a referral, don't say "hey do you know someone who could use my accounting services?" Instead say, "do you know one or two people like you, with XYZ needs, that could use my accounting services?" Are you looking for high net worth individuals or mid-size companies? Say so. The more personal the request, the more likely your request will be remembered. Plus, if you don't tell your clients specifically who you are looking for, you'll waste time pursuing leads you can't use.

4. Make it easy: Don't just ask a client for a referral; make it easy for them to give you one. Your clients are more time-constrained than ever. If giving you a referral takes extra time or headache, then they won't do it. Creating something that can be easily accessed from a mobile phone or on social will significantly increase their likelihood to send you a referral.

Here are a few ideas:

Email ideas:

- Write the referral email for your clients and ask them to drop in their name and send to their friends
- Create a mobile-friendly referral form on your website and send your clients the link
- Create a referral form on your website with social sharing capabilities and tell your clients about it via email, social or in-person
- Email your clients a virtual business card they can save in their phone and forward to friends (*note: check out bvcard.com to create a free virtual card and QR code to post on fliers or your website*)

Social media ideas:

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- Create a Facebook post and share it with your clients online. Encourage them to share on their page or tag their friends in the comments section.
- [Create a blog post](#) about your services on LinkedIn and share it with clients for them to share
- Pre-write a tweet that includes the referral and send the link to clients (*note: check out clicktotweet.com to create a free tweet that your clients can share*)

5. Be repetitive: Asking for referrals shouldn't be a one and done thing. Your clients meet new people all the time. 6 months ago they may not have known someone to refer, but today they might. Create a calendar of the key times of the year when your services will be in demand and send referral request emails to your clients a few weeks before.

6. Follow up: Once a client has sent you a referral, thank them. A simple, handwritten thank you note, flowers or small gift are all great gestures. Whatever you do, don't give them a monetary gift like a gift card, discount or money. According to behavioral economist, Dan Ariely, non-monetary gifts help to establish community and a more natural reciprocity. Plus, you don't want your clients to feel as if they were paid for sending a referral your way right?

A word of caution: Below are two sample emails you can send to clients to request a referral. Feel free to insert your own language and style but I encourage you to not change the structure. Email, especially email that's read on a phone, needs to be short and sweet. Keep the nice-ities and the pleasantries at the end and make sure you get to the point of your email in the first 2 - 3 sentences. It won't be considered rude and your clients will appreciate the clarity and brevity of your email.

Sample Referral Email Request 1

Dear [client name],

As you know I am the owner of a growing accounting practice. As I look to expand my practice over the next year, I'm reaching out to people that I trust within my network to help me generate more business.

Much like how I've helped you with [*insert your client's needs here*], it's my goal to help as many [*insert your type of target client here*] as I can to [*insert your mission or what you hope to achieve*]. Are there one or two people you know that could use my help? If so, can you please send me their contact information?

4 Ways to Refer:

1. Hit reply to this email with the contact info of 1 to 2 friends
2. Send the attached virtual business card to your friends
3. Click here to tweet this link
4. Share the attached flyer with 1 to 2 friends

I know how scarce time can be, so thank you in advance for your time and referrals. As your accountant I'd be extremely grateful. And of course, as your friend, they'd get the royal treatment.

Sincerely,

Jon Jones, CPA

Sample Referral Email Request 2

Dear [client name],

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[Insert an upcoming event] is just around the corner and as I look to expand my practice, I'd like to reach out to you again for help in generating more business.

When I started my practice, my goal was (and still is) to help as many *[insert your type of target client here]* as I can to *[insert your mission or what you hope to achieve]*. Are there one or two people you know that could use my help over the next month or so? If so, can you please send me their contact information?

4 Ways to Refer:

1. Hit reply to this email with the contact info of 1 to 2 friends
2. Send the attached virtual business card to your friends
3. Click here to tweet this link
4. Share the attached flyer with 1 to 2 friends

I know how scarce time can be, so thank you in advance for your time and referrals. As your accountant I'd be extremely grateful. And of course, as your friend, they'd get the royal treatment.

Sincerely,

Jon Jones, CPA

Remember, referred clients tend to have a 50%+ close rate. What's even better is that they're FREE and what accountant doesn't like free?

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