

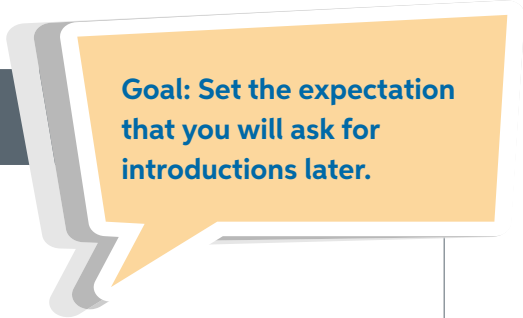
# Relationship & referrals

## Tips for developing great referrals

Here are some great ways to grow your business while also providing much needed protection advice to middle market Canadians.

### Three easy steps:

1. After confirming that your client is pleased with the work you have done, ask if they know anyone who might benefit from the type of advice you can provide.
2. Help your client provide referrals by suggesting groups of people in their community such as friends, relatives, business associates, etc.
3. Don't be shy! Ask for an introduction. The most successful introductions are done in the moment.

A yellow callout box with a white border and a drop shadow, pointing towards the first step of the list. It contains the text: "Goal: Set the expectation that you will ask for introductions later."

**Goal: Set the expectation that you will ask for introductions later.**

### Three simple tips:

1. Make a list of the types of people you want to meet and be ready to provide that list to your clients.
2. Make sure your client understands that a personal referral benefits the person they are referring by offering a trusted source of financial advice.
3. Be prepared for declines and objections.

### Three things to work on:

1. How do I develop a focused opportunities list of prospective clients?
2. What should I say when introducing the idea of referrals?
3. How should I respond to objections when I ask for introductions?