



ASKING FOR REFERENCES

Sellers must always be prepared to provide references. When asked, you need a well-honed process for gathering client references, and for going above and beyond both for our prospective client and for our clients who are serving as those references. The purpose of this tool is to outline that process and get you ready to provide references at a moment's notice.

STEP ONE - MAKE A PROMISE

When asked for references, make a specific promise about when you will get them your references (we like a 48 hour turnaround, as it indicates that you respect your clients' time by asking them permission. It also makes a promise you can then keep)

STEP TWO - GO ABOVE AND BEYOND

Go above and beyond by offering two more references than were requested for smaller deals, five more than asked for larger deals (shows confidence, strength)

STEP THREE - MAKE THE ASK

Construct an email 'ask' that:

- Personalizes the email
- Provides context
- Specifies the ask
- Respects the client's time
- Gives your client an 'opt out'
- Makes an offer

Here's an example from our Sales Engine Toolkit:

Dave -

I hope this finds you and your team well! I've been thinking about you all a lot, and in fact have been staying close with Stephanie and Johan on the great work with XYZ.

Quick update: all well on this side. We've seen strong growth in some new customer segments, and so far so good on our recent European product launch. Good stuff.

The purpose of my note is to **make a request:** My Sales Engine team and I are currently proposing a very large series of projects for ABC Company. They are a prospective client, and they are hoping to make exactly the progress that we love to help with. Our proposal is to build out THEIR team, in much the same way we worked with you over our first couple of years together. **I'm wondering if you would be willing to serve as a reference for our work?**

We are at the stage where they are discussing our proposal at the very senior level, and they will likely want to talk to some of our clients about their experience with us. If you are willing, I would of course give you a heads up and help coordinate when they are ready. I anticipate that they would only ask for a very short conversation.

Dave, all that said, I know you are super busy, so two additional thoughts. One, if this is not the right time, NO worries at all. Two, if you are able to do this, I would be happy to write out a few thoughts for your consideration...just to make it easier on you. Let me know either way when you have a chance and I will follow your lead. My best to you and yours,
Craig

STEP FOUR - THANK YOU NOTE

When clients respond that they are willing to provide a reference for you, write them an email thank you immediately (of course) and a hand-written thank you note and pop it in the mail.

STEP FIVE - ENDORSE BOTH CLIENT AND PROSPECT

When you make the introduction, be sure to add warmth and context by endorsing both of the parties you are connecting. Here is an example from the Sales Engine Toolkit:

Dave -

It is my pleasure to introduce Jackie Smith to you. Jackie and I have been in conversations about connecting our Sales Engine team with hers and building some muscle around transformation. I've found her to be a great partner throughout our discovery efforts - very thoughtful and curious. As such, she would like to connect with you to learn more about your experience with us.

Jackie - Dave Jones is the CEO of XYZ Company, and several years ago he allowed us to work with his various teams on a similar transformation effort. He has always provided us with powerful leadership and clear direction, and we are grateful for that. Dave has shared with us that he's willing to spend a bit of time with you helping you gain some insights into us and our work.

I'm hopeful you two can connect. If you have any difficulties doing so, please let me know and I will jump back in to help.

Thanks to you both,
Craig

STEP SIX - FOLLOW UP

Now, follow up separately via email with your prospect, asking her to let you know once she has connected with your client so you can properly thank that client for taking time with her.

All of this diligence you do in setting up and connecting references with your prospects makes you unstoppable. It's yet another sign of why you will be a great partner.