

GATHER

Before the gathering of referrals it's important to get the clients excited about what they've done for their family, and what they can do for their friends and family.

EXAMPLES:

- "John, Mary, do you have any questions about what we did here today?"
- "What was your favorite part about the program, cash back, critical illness etc.?"

TIE DOWN:

"The last part of this program is probably the best part. Sometimes people ask why doesn't everyone have protection like this? And truthfully it's because they aren't as financially responsible as you and they don't know where to start nor who to trust. However, because you took action and refinanced your home and protected your family they allow you to invite up to 5 people to look at a custom tailored program for their family and if it wasn't for you (purchasing your home/ refinancing) and thinking of them they would have never gotten the opportunity. Now you want to be selective because you only get 5. Who's the first family you'd like to do that for? You obviously want to start with your brother. You said that lives nearby?"

The first Referral must be assumptive and pulled. Once the flood gate is opened you can get multiple. If you can get one you can get a handful. **HERE'S THE KEY: "Who's next?" NOT "Is there anyone else?" (NO YES/NO QUESTIONS).**

QUALIFY

This is a very important step. A non-qualified referral is equivalent to calling a name out of a phonebook. A Qualified referral is having complete information on the individual that was given:

- Full name
- Complete address
- Occupation
- Age
- Marital status
- Number of children
- A Unique Story

COMMIT

"Now if I were to call these people and they didn't know I was going to be calling how do you think that call would go?.. Not very good right? I'm not a telemarketer and I want to do the best to help your friends and family, but I need you to do me a favor. Can you do me a favor? ...Yes... ok can you text them and let them know I'll be giving them a call?"

SEND A TEXT