

The referral opportunities roadmap.

How to create signposts to your business.

1 If someone's been knocked back by traditional lenders and looking for alternatives, they're likely to ask for recommendations from friends, family or professionals they know.

Your name needs to be the one they refer to.

3 Earn their trust. Be upfront and set realistic expectations for them from the get-go.

5 Make the moments that matter, matter. If they have to call you to find out how their application is going you are not delivering.

7 Call them when the funds clear to congratulate them.

When funds clear so does all the worry. Now is a good time to say: "It is so awesome to have this sorted for you. The best compliment we know of is a referral. Do you know anyone you think could benefit from having a chat with us?"

8 Send a congratulatory email as follow up.

In your email message provide a click through to ratings options, saying something like: If you liked our service please let others know about it. Click here to rate us/recommend us.



2 When they've been knocked back they're more likely to want to talk to a broker.

Be referable.



4 Communicate. Get feedback at the end of the first meeting. Find out how they're doing. Ask them if they understand everything, if there is anything at all they're not clear about, and check how they're feeling.

At the end of the first meeting, if you've made them feel relieved and in good hands, it can be an opportune time to say: "We specialise in helping clients who face difficulty getting finance with the banks - feel free to take a card if you know anyone you think we should talk to."



6 Let them know when the loan is approved, if there are unexpected delays and how long funds clearance takes so they are not left wondering or worrying.



9 Get in touch a couple of months down the track to make sure they are still doing well. They are now part of your referral network - and very likely to know someone who could use your help...

Have a clear call to action (CTA) before your sign off: For example, so good to hear all is well with you. Don't forget to tell your friends about us. Or, A referral is the best compliment.

Always thank them when they refer. We all like to be appreciated.

