

Working by Referral Tips

*Maximizing Your Client Appreciation Program – **The Pop-By Plan***

A Pop-By is a short visit to one of your valued clients during which you give them a small Item of Value. It is a great way to get face-to-face with your clients…and when you're working by referral, face-to-face communication is by far the best.

Pop-Bys are the quickest and most effective way to generate referrals while simultaneously sorting your database.

Pop-Bys will help you…

- Cultivate deeper relationships with the people in your database.
- Keep your clients constantly aware of your services.
- Ask for and receive referrals.
- Stay on top of the needs and wants of your clients.

How-tos:

- Make a list of the people you would like to serve and receive referrals from.
- Mark on a map where those people live or work.
- Prior to your visit, call and use the following dialog: "I'm going to be in your area tomorrow between _____ and _____ and I'd love to stop by for just a few minutes to see how you're doing. Don't worry about getting anything ready for me. I'm just going to Pop-By with a little something for you."
- Visit for no more than 15 minutes and remain standing. (Otherwise it will become a "plop-by.")
- Use the "Big 3 Dialog" to ask for a referral. ("Big 3" refresher: offer your assistance; remind them of their value; close with "Oh, by the way…")
- Follow up with a personal note.

Coach's tips:

- Go see the people you like best, first.
- Make sure your gift is about your client's needs and not your own.
- Keep your map and a supply of Pop-By gifts in your trunk at all times.
- If scheduling a block of time to do Pop-Bys is a challenge, fit them in while traveling to and from your other appointments.
- Bring someone with you and keep the car running; this'll ensure you make the visit short.
- Do Pop-By your clients' workplace! You'll be able to meet more people and create excitement among their coworkers.

Some Pop-By gift ideas:

- Energy-saving light bulbs
- Homemade treats
- Small tools for use around the house
- Plants or bulbs to plant
- Popcorn and movie rental cards
- Flowers
- Back-to-school items for the kids
- Home emergency kits
- Gas cards
- Community events calendars
- Car wash coupons
- First aid kits
- Smoke detector batteries

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