

# 10 Step Discussion Guide: PREFERRAL SOURCES



1. **"Thank You . . ."**  
for your TIME and WILLINGNESS TO HELP me
2. **"I've Got a CHALLENGE and I'd Like Your HELP . . ."**  
but, before I tell you about that, I have to ask about something else
3. **"How Well Do You UNDERSTAND what I do for my clients?"**
  - Determine if they truly understand what you do
  - "On a 1 - 10 scale , how would you rate the QUALITY of my work?"
  - Challenge them to confirm their commitment of you as a '10'
4. **"I like to MEET people . . . through people we both know, like and trust . . ."**
  - Normally, I meet people who have NO NEED . . . for the services and benefits I offer . . . because . . .
  - Ordinarily, I meet people by INTRODUCTION . . . not crisis . . . through people we know in common
  - Typcially, the kind of person I may be of value to looks like this . . . (share your Preferral PROFILE)
5. **"I already KNOW a number of people / I'm currently WORKING with clients who are . . ."**
  - SHOW: Who Do You Know? (form with your 4 C V S characteristics on it)
  - SAY: "I already have clients who are . . ."
  - WRITE: a (first) name under each factor and tell a story about them (to prime their mental pump)
  - ASK: "Would I be correct that you also know someone who . . ." (write their name in each quadrant)
  - ASK: "As you think of \_\_\_\_\_, who ELSE comes to mind . . . in that same circle / category?"
  - WRITE: their names . . . on the Who Do You Know? form in the appropriate space provided
6. **"If we were SITTING in a restaurant . . . and one of these people stopped by the table to say, "Hello" . . ."**
  - would you INTRODUCE me . . . or, pray I'd become INVISIBLE like a stealth fighter until they left?"
7. **"Well, here's the PROBLEM . . ."**
  - we're NOT sitting in a restaurant . . . and we're NOT likely to run into these people . . .
  - But I do appreciate that you *would introduce* me if they stopped by (Whew! That was CLOSE!)
  - Actually, you CAN still introduce me because . . .
  - if they haven't met me BEFORE they might need me, they'll never find me when they do, fair?
8. **"Just So You Know . . . I normally send a LETTER to someone I'm being introduced to . . ."**
  - SHOW: sample Letter of Introduction
  - REMIND: them how they may have already met you this very same way from a prior Preferral!
  - EXPLAIN: how you typically connect with someone you're being introduced to . . .
    1. MAIL . . . a Letter . . . (show sample!)
    2. CALL . . . to Follow-up in a few daysPossible Outcomes (Traffic Light):
    - "Not a Candidate . . . Now or Ever" ("Thankyouverymuchhavaniceday")
    - "Interested, BUT . . . not right now . . ." (OK to Keep-In-Touch?)
    - "Good Timing . . . Let's Meet" (keep Source advised on developments)
9. **"I also provide YOU . . . with a FOLLOW-UP REPORT . . . after I connect"**
  - SHOW: Sample 'Follow-up Report'
10. **" \_\_\_\_\_, can you see ANY reason why . . . this approach would NOT be acceptable . . . for you?"**