

NAVIGATOR

Leveraging Client Learning Events

An event to update clients on the news impacting them is introduction gold. The following describes ideas on how you can make the most of these opportunities.

Ideas

a. Do you track which of your clients (and influencers) have sent you referrals in the past? Have they been the types of leads that you clamor for? If you have what we call “Advocate” level clients (those who refer people they care about to you), make an Advocate list containing their names.

Reach out to these clients (calling is better but emails are OK). Thank them again for referring the people they care about to you and state this or something similar:

“We all recognize your trust and the great referrals you have shared with us. Thank you. You provided us with ideal new clients. If you know other folks you care about with similar needs, please bring them to our Workshop (fill in the date and location). We are only offering a small and select group the opportunity to bring a special guest. We won’t put a hard sell on them, we only request a simple introduction during this fun event.”

b. Now, make a list of the clients you currently have that came in as referrals themselves. Focus on those that fit your ideal client profile and create a new list with their names. These clients get the concept of referrals, as they were one once.

Reach out to these clients with a similar statement:

“We all enjoy working with you. In fact, you are one of our top clients. If you know other folks you care about with similar needs, please bring them to our Workshop (fill in the date and location). We are only offering a small and select group the opportunity to bring a special guest. We won’t put a hard sell on them, we only request a simple introduction during this fun event”.

Idea Sheets provide quick and actionable suggestions to drive more referrals and introductions. Visit the [Navigator website](#) often for new additions.