

NAVIGATOR

Hidden Opportunities

You're our kind of financial advisor: referable, serious about growth, and open to ideas.

Increase referrals for your firm from a lackadaisical group of clients and influencers.

Where does your base of clients and influencers fit in the following graphic?

- Those in the *left column* never refers and likely never will. They had a bad experience, or don't like talking about money with others. We'll leave them alone.
- Conversely, those in the *right column* are hard-core advocates. It's the 80/20 rule; this group produces most referrals. We'll also leave them alone.

Now, let's look at the largest group in the *center column*. They're content, but they aren't producing many introductions.



Because referrals happen without you, sharing your memorable story is important.

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