

NAVIGATOR

Saying “No Thanks”

We all work hard to get better referrals. No matter how hard we try, occasionally, an introduction comes in that isn't aligned with what we sell.

Ideas

One of your favorite clients just referred someone they care about to your firm. No matter how you analyze this opportunity, you know it's not a good fit.

Although you feel awkward, it's OK to say no. And it probably won't be as bad as you think, so relax. But before you get too comfortable, you should address two items:

1. You need to let the referral know you can't help them. We suggest a conversation, though an email is fine. Understand it'll likely be shared with your client.
2. You must let your client know as well. During a chat, share that you couldn't help the recent referral. This is a golden opportunity to educate on your areas of specialization.

Referral “no, thank-you” script.

a. “Thank you for your email about working with you; we feel privileged that you reached out. Having reviewed your situation, unfortunately, we realize you need a specialist outside the areas we shine in. You'll get the best results with a firm specializing in these services. (Only offer the following if applicable). I would be honored to introduce you to a colleague at another firm that meets your requirements.”

Client update script.

b. “Thank you for your trust in us. We're so honored you provided a referral. Having reviewed (insert name) situation, what they need is outside our areas of specialization. I have shared this with (insert name), and (only if you have) I have suggested an expert in that area.”

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