

Asking for Referrals

Asking for referrals can feel very intimidating, but clients want to help their accounting firm, too. ClearlyRated’s study found that 70 percent of accounting firm clients have given a referral in the past six months, yet many firms aren’t doing enough to identify and ask their most loyal clients to help them tell their story. Finding the right words and the right time is the hardest part. Here are our best practices to follow when asking for referrals from clients.

Ideal Timing

Ask for a referral after a satisfaction survey has identified your most delighted clients.

How to Ask

“Is there anyone else in your industry or network you think we should be working with?”

There is no perfect ask

You don’t want *the ask* to feel awkward, so choose the approach that makes you feel the most comfortable. It’s most important that you are genuine with your method. Also, your method may vary for different clients depending on their preferred method of communication. Whatever you feel most comfortable doing is going to be the best method for you.

SAMPLE EMAIL

To: Bob
From: Your Name
Subject: Ipsum Dolor Sit

Hi Bob,

Thank you for participating in my satisfaction survey last week. Your feedback is always very helpful and I appreciate you taking the time. I'm thrilled to hear you're so happy working together. Let me know if there is anyone else in your industry or network that you think we should be working with. I always like to keep my new clients close to home.

Enjoy the afternoon!

Your Name

SAMPLE PHONE CALL/VOICE MESSAGE

The diagram shows a conversation between 'YOU' (top) and 'CLIENT' (bottom). 'YOU' is represented by a person icon with a blue headband and a green necklace. 'CLIENT' is represented by a person icon with a white shirt and a green bowtie. Speech bubbles contain the following text:

YOU: Hi Bob – I wanted to call and thank you for participating in my satisfaction survey last week. I really appreciate your feedback!

CLIENT: No problem. It's been a real pleasure working with you!

YOU: You're a pleasure to work with as well. I'd love to work with more people like you. Do you know anyone in your industry or network that you think I should be working with?