SMARTer Entrepreneurs

FREE QUICK CARD

CLIENTS I QUICK CARD CL-03

Making referrals easy

Fifteen minutes, your last ten clients, and the questions a good coach would ask you.



The practice

Most businesses that sell expertise will say, with some pride, that nearly all their work comes from referrals. Ask how they get them and there is a pause, then a vaguer answer about doing good work and people talking.

Surveys of professional services buyers (Hinge, a US marketing company) found that most had never referred their provider because nobody asked, and that half of referred buyers ruled a provider out before calling because they could not tell what it did. A consultancy traced its last ten clients: seven came through someone who knew it, and it had thanked two. So trace where clients come from, thank every referrer, give people one sentence to repeat, and ask at natural moments.

Where your last ten clients came from

Client 1: where they first heard of us, and who referred them
Client 2
Client 3
Client 4
Client 5
Your one sentence: we help _____ with _____, so that _____

Five is enough to see the pattern; ten is better. Mark who has been thanked and told what happened.

Try this this week

List your last ten new clients and where each first heard of you. Then thank, by name, everyone who referred you and has not yet heard what happened.

THE OTHER SIDE OF THE CARD

Coach yourself

Fill in the front first. Then take fifteen minutes with these, in writing.

1. Look at your ten. How many came through someone who knew you, and how many of those people have you thanked?

2. Of the ten, who referred you without ever being a client (an accountant, a contact, a former colleague)? Have they been thanked?

3. If a client tried to recommend you tomorrow, what would they actually say? Is it your one sentence?

4. When was the last time you asked anyone for an introduction, and what was the moment?

5. Which three clients would be glad to be asked this quarter, and after what?

6. Who in the business will record where every new enquiry comes from, starting today?

If you catch yourself saying...

You hear yourself say	Try asking instead
"I don't want to look desperate"	How do you feel when someone asks you for a recommendation?
"Good work speaks for itself"	What is that belief protecting you from?
"They know what we do"	What would they say if a friend asked them tomorrow?

ONE HARDER QUESTION

Who has sent you work more than once and never heard a proper thank you?

Keep it going

Decide who records the source of every enquiry and which quarterly meeting asks "who referred us, who have we thanked, who have we asked?" Put three dates in the diary: 3, 6 and 12 months from today.

When to get help

Paying for introductions, or being paid: check your professional body's rules first and put it in writing. Marketing emails to individuals have rules too; the ICO publishes guidance.

What a coach adds

This card gives you the questions. What it cannot do is notice which one you avoided. It is one of the SMARTer practice cards, covering the ten key areas of a business that sells expertise.

Talk yours through with me: book a Discovery Call at smarterentrepreneurs.co.uk

No pitch, no pressure, and you'll leave with something useful either way.

Quick card CL-03 v2, October 2026. Sources: Hinge Research Institute (2015, 2018); Schmitt, Skiera and Van den Bulte, Journal of Marketing (2011). © 2026 SMARTer Entrepreneurs. Free to share with other business owners, unchanged and with this notice.