**The Referral Upgrade Checklist**

For ease of reference, the following is a list of all the steps in the *Referral Upgrade* process from start to finish.

**•** Identify your Big Three using the method described in Chapter 6.

**•** Fill out your own Big Three profile.

**•** Enter the names of the prospects you would like to interview in your CRM or other program. You and your assistant can work the list together or separately.

**•** Call and book the initial interview, using the scripts discussed in Chapter 8, and send a confirmation email.

**•** Print (or download onto your tablet) the Big Three profile you will use in your interviews. You can customize it as you gain more experience.

**•** Meet with your client or referrer to conduct the interview. Remember to tell him you’d like to interview him as you think you may be able to refer him.

**•** Focus your attention entirely on him and his vision throughout the interview.

**•** Review his profile with him at the end of the interview and recap what you heard. Amend or correct anything your interviewee may suggest. Notice that this is a great opportunity to give people sincere positive feedback, and they appreciate hearing it.

**•** Discuss any potential referrals that may have occurred to you during the interview.

**•** If you have someone in mind, tell him that your assistant will contact him to schedule a date to make the introduction.

**•** Or, if appropriate, schedule the date now for a follow up session in which you trade profiles and brainstorm how you can work together to introduce each other to your Big Threes.

**•** Or, if you sense the timing is not quite right to schedule the follow-up interview, tell him you will be on the lookout for the right person for him and follow through with referring him.

**•** Give him a copy of your own Big Three profile in this fist interview. Walk through it briefly, so he understands the type of people you are looking for.

**•** If you find out that he is someone else’s ideal client rather than yours, offer to make that introduction and conclude your interview here.

**•** If he is in the right category of client or referrer for you, return to your office and have your assistant type up a copy of his interview profile and then proof it.  
This will assure the accuracy of his profile and help you to internalize his Big Three, so you will recognize them when you see them.

**•** Send or email a thank you note along with a copy of his profile. Reference your next action steps, such as an introduction meeting or follow-up session.

**•** If you have someone to refer to him and have not already done so, have your assistant schedule a face-to-face introduction, with you present, at a location convenient to your guests. Hosting breakfast or lunch works well. The idea is to build relationship with each of them, and that’s easy to do if you are present to do it.

**•** Or if your next step is a follow-up session and it hasn’t been booked yet, schedule it and be sure to have a copy of his printed profile ready in advance. Don’t wait for the day of the appointment and then try to decipher your notes. Follow up with a confirming email or letter.

**•** Confirm the time and location of the introduction meeting the day before with both parties.

**•** During the introduction meeting, do a little matchmaking but mostly sit back, listen and let them get to know each other.

**•** Call each of them to follow up. If appropriate, set up a follow- up session with the first person to discuss creating an ongoing plan of identifying and referring him to his Big Three. Or give him another referral.

**•** Then schedule an interview with the second person, if you haven’t done so already. These are major opportunities. It really shows both parties that you mean to continue to refer them to their best clients and referral sources. Would you like it if someone like this showed up in your life? I would, and this is the path to making that happen.

Adapted from Chapter 11 of *Referral Upgrade: A New Way to Find Your Very Best Clients* by Hank Frazee. For more information please visit [www.HankFrazee.com](http://www.HankFrazee.com)