UGURUS

THE ULTIMATE REFERRAL ENGINE KIT

THE (REALLY SUCKY) “FEAST OR FAMINE ROLLER COASTER”

If you’re like most of the 1000+ agencies I’ve talked to...

You know what it’s like to ride the feast or famine roller coaster.

That’s what I call the vertigo-inducing process that leaves you RIDICULOUSLY busy during the best of times…

And desperate for work during the worst.

Maybe you’re even riding the feast or famine roller coaster right now.

If you’re in the middle of a famine, I don’t have to convince you why you need a new client or project immediately.

You know it. And it’s likely the main thing that’s keeping you up at night. And chances are pretty high that you need another client RIGHT NOW.

However, if you’re currently feasting—if you’ve got plenty of work at the moment—it might be harder for me to convince that you still need a client right now.

But you do, if you think about it...

Because another client will help you avoid a famine cycle in your future.

And what I want most for you—regardless of the stage your business is in right now—is a steady pipeline of clients and high-value projects.

However, if I’m being honest, I also want to make sales easy for you.

Because here’s a secret.

I pitched hundreds and hundreds of website and marketing projects over the twelve years I ran my agency...

But for me, selling was often a struggle.

When I looked at what made our agency so successful…

When I analyzed how we rocketed to more than three hundred clients under active management...

When I sat down and decoded where all of our clients came from, there was one strategy above all else that drove the best results:

Getting referrals.

WHY I LOVE REFERRALS (HINT: IT'S THE SAME REASON YOU DO)

Referrals are awesome for so many reasons, but the big one is the instant credibility.

You know what I'm talking about.

When you get a call from a referral—like when one of your clients tells their friend how you solved their problem so well—they already know, like, and trust you.

Because whoever referred you took their reputation and put it on the line.

So their reputation becomes your reputation. The person thinking about doing business with you trusts YOU almost as much as they trust your mutual contact… Just by virtue of that contact referring you.

But there's another level of reputation at work here.

If word gets back to your mutual contact—the person who referred the new client to you—that the new client treats you poorly, it will reflect on THAT CLIENT'S reputation.

That means, that for the sake of both of your relationships with your mutual contact, the new client will be inclined to treat you better… JUST TO IMPRESS THE PERSON THAT REFERRED THEM TO YOU.

To sum it up simply, referrals…

- Trust YOU because they trust WHO REFERRED THEM
- Transfer their trust in your mutual contact—your referral partner—to YOU
- Show up better because their own reputation is on the line
- Often come nearly pre-sold on what you do because of what they've discussed with the referrer
- Have usually "self-qualified"—because they want what your referrer has, they make better leads

I could go on.

But I don't think I need to sell you any further on the benefits of getting referrals. What I need to do next is TEACH YOU exactly how to drastically increase the number and quality of referrals you get...

So you can get more clients like clockwork.

RIGHT NOW, YOU'RE PROBABLY LEAVING REFERRALS TO CHANCE

How do YOU get most of your clients right now?

Take a moment to stop and think about this question.

I bet it's referrals and word of mouth too.

Except I bet there's a difference between how you probably get referrals right now…

And how I learned to get them.

Why am I so sure?

Because most agency owners I meet have zero control over when and how they get referrals.

When I'm working one-on-one with agency owners, I'll ask how they get most of their clients.

They'll respond with, "referrals and word of mouth," and then I ask this follow up question:

"What systems and processes do you have set up to get these referrals?"

This question is almost always met with an uncomfortable silence.

For most agencies, referrals just "happen when they happen."

Usually, people just sit by the phone or inbox and hope that they'll get that hot new lead just in time to save them from the dreaded famine cycle.

If this is you, and you need more clients RIGHT NOW, then you're in the right place.

By the end of this guide, I'm going to teach you exactly how to generate referrals on-demand so you can get more clients—as soon as today or tomorrow.

I'll show you the strategies and specific tactics I used to more than double the number of clients I had.

Put them in place for your own business, and selling will get a whole lot easier.

You'll make more money—so you can achieve a little more freedom in your business and life.

You'll get off the feast or famine rollercoaster once and for all.

And you'll find yourself saying...

"It's MY time."

Ready?

HOW I CRACKED THE REFERRAL CODE - AND HOW YOU CAN, TOO

After my agency had worked with about a hundred clients, I wanted to figure out where they came from.

I thought that if I could determine where I was getting clients from, I could crack the code and get a lot more clients.

Because I was sick and tired of the ups and downs. Of not knowing when I'd get my next client.

So I went into Freshbooks, clicked on my client list, and hit print.

Then, at the coffee shop across from my office, I sat down, armed with a few cups of strong coffee. And I worked through my entire client roster to determine where my clients came from, when they found us, and how they had come into our orbit.

I discovered that almost half of my clients came from referrals. There in the coffee shop, spread across a dozen or so pages, I had drawn out a diagram that showed exactly who was referring me, who referred them, and what was going on with our relationship at the time.

The whole thing resembled a sort of family tree.

Realizing that so much of my business came from referrals felt like a huge breakthrough.

For a quick moment, I felt like I had discovered a profound truth about my business that had been hiding in plain sight.

But I also almost gave up on trying to gain control over how and when I got clients.

I knew I wanted to scale my agency, but after all—I couldn't force people to refer me. I couldn't compel them to talk about me.

But then I thought...

Well, what if I could?

What if I could figure out a way to create a referral engine—something that I could control?

What if I could crack the code on why and how and when clients were most likely to refer me, so I could stop guessing when my next client would find me?

Guess what? I did.

And I developed 3 powerful referral strategies you can put to work RIGHT NOW.

What I figured out in that coffee shop helped my agency add another two hundred clients in just a few short years.

And now I'm going to share my three best strategies with you…

So you can start doing the same.

STRATEGY #1:

THE "LIST & ASK" METHOD THAT MAKES IT EASY TO REQUST REFERRALS

You have two choices. You can sit by the phone and hope that it rings to get referrals. (Boring!)

OR you can take action and go GET the referrals that are out there waiting for you.

You know why you're not getting referrals right now?

Because you're not top of mind.

Now, this might blow you away (wink) but your network, past clients, friends, and family are NOT thinking about you right now.

They're thinking about themselves.

We all are. We're thinking about our own goals, ideas, and problems.

That fact—each one of us is primarily concerned about our own thing—neatly explains what I discovered in the coffee shop.

When I analyzed all of my past clients that had come from referrals, I found out that 80% came from ACTIVE projects that we had been working on.

Why?

Because at the time those clients had referred others to us…

Our agency and the project we were working on with any particular client were TOP OF MIND.

Our clients were out there talking about what they were up to.

What they were spending their hard earned dollars on.

If you're having trouble understanding, imagine a recent client you've been working with.

Imagine that the client is out at an event, or in a meeting with someone, or doing whatever else it is they do during the normal course of their day.

Now imagine someone else comes up to them and says "What have you been up to lately?"

And they might respond with something like this:

“Oh man, we’re busy. We’ve been working on launching our new website. It’s a big project… but we’re really excited about the company we’ve been working with. They are taking care of all of the details for us.”

And then the other person replies with:

“Oh yeah? Who are you working with? We’ve considered redoing our website for a while. Maybe you can send an intro?”

And that, my friend, is how MOST referrals happen.

Which is why we got the most referrals from clients that we’d just signed, that we were actively working with, or that we had just launched.

And why you will too.

When you’re working with someone, you’re TOP OF MIND—and they’re out there talking about you.

So this “List & Ask Method” is about putting yourself in front of your entire network in a way that keeps you top of mind in as many ways as possible.

Just like the name implies, there are two components of this method.

The first is building your list.

The second is asking that list for warm introductions and referrals to people in their network.

I want to break down both steps to make this super easy for you to implement.

STEP 1: BUILD YOUR LIST

Too often when people consider a campaign or tactic, they fail to “fuel” it with enough potential energy.

Think of your list as a fuel source, like a battery or gas tank.

The bigger and better your list, the more results you’ll ultimately get.

You will get several “no’s” on your way to success. No response. No, not right now. No, not ever.

That’s ok and EXPECTED. Having a list helps you overcome that by stacking the odds in your favor.

Let’s say you have twenty past clients on your list. Even if 80% say “no”—that means four people will say “yes.” Four past clients, each sending you one to three referrals, translates to a lot of leads.

If this is your first time building a list, you might have a hard time thinking of names to add.

You might feel like you don't yet have a big network or enough clients to add.

But chances are, you know a lot more people than you think you do.

Here are the types of people that you should add to your list:

1. Current clients
2. Past clients
3. People you know in your market
4. People you met once in your market
5. People you know or have met in similar markets
6. Friends
7. Family (yes, FAMILY)
8. Contacts in your address book, social media contacts, and anyone you've ever had a conversation with (via email or phone)
9. People you think someone in your network knows

On the next page is a worksheet to help you start your list.

Start with your BEST contacts. With the people who have already paid you money at some point—and start with the people who have paid you the most.

These people already know, like, and trust you.

In most cases, they will be excited and energized to repay the value you've provided them in the form of referrals.

(That being said, I've never done business with some of my BEST referring partners, so don't get discouraged if you don't "hit it out of the park" with some of them.)

HOT REFERRER LIST

	Name	Relationship	Phone	Email	Asked (✓)	# of Intros
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

STEP 2: ASK THE PEOPLE ON YOUR LIST FOR REFERRALS

Once you have your Hot Referrer List, the next step is to reach out to each name on your list, have a conversation, and ask for the referral.

This can happen a number of different ways, but each has the same end goal: getting introductions to grow your network, identify possible new clients, and earn you new clients as soon as possible.

Ask #1: The 9-Word Ask

I want you to get results quickly.

And the best way to make that happen is to start as simple as possible.

The 9-word ask cuts through the clutter and gets your intentions and need in front of your list as soon as possible.

Here is the core question:

> *"Do you know anyone that can use my help?"*

One of the beauties of the 9-word ask is that it does not beat around the bush.

It's also extremely specific.

The other great thing about this sentence is it's crafted carefully to avoid "client" or "project" or other words that imply selling.

I love sales and selling, but also know that people don't like to sell their friends and network without their permission.

Finally, when you ask this question, your referrer network will have to consider who they know and what they know about you and your abilities—and they will have to answer.

The question might immediately illicit an "Hmm… I'm not sure. Who are you looking to meet?" or "Can you tell me a little bit about what you can help with?"

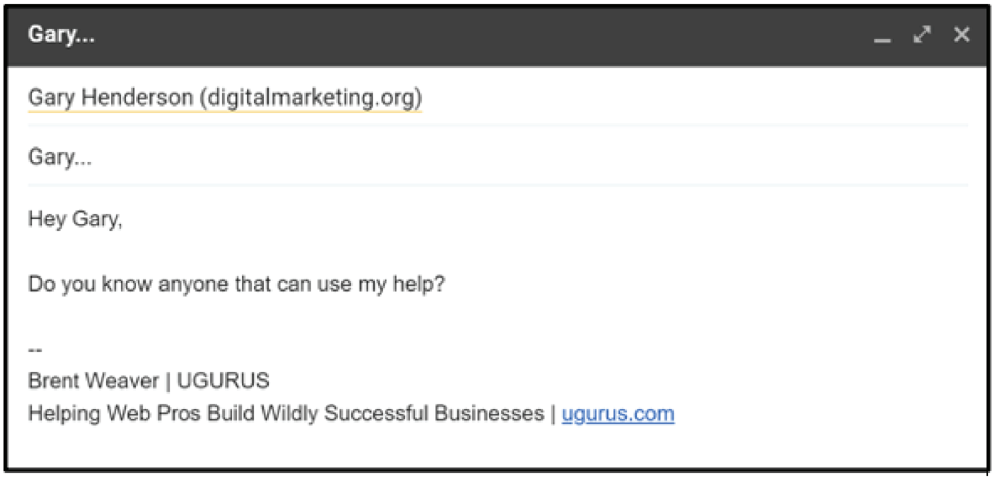
Or better yet, they'll think for a moment, and then start giving you some names and possibilities.

You can use the 9-Word Ask over the phone or in an email or social media message.

It works great in any circumstance.

And I usually recommend to let the 9-Word Ask do the work for you. Don't wrap it up in nervous energy. Just let it out of the box and then see what the response is—and take it from there.

If you're not sure what I mean, here is an example of the 9-Word Ask in action:



Short, sweet, and to the point.

You might want to add a bunch of explanation and whatnot.

Don't. Keep it direct and to the point.

(And if you're curious, this script works just as well on SMS or social platforms like LinkedIn and FB Messenger.)

Ask #2: Intro to a specific type of person

The easiest and most basic way to ask for a referral is to simply ask for an introduction to other specific people.

Let the name on your list know that you are looking to meet more people like [insert specific type of person here]—and help them brainstorm a few names of people that might be a good fit for a conversation.

With this approach, it's important to avoid asking for "clients," since you are focused on getting intros to a certain type of person, regardless of where they are in their buying process or need for your services.

The more specific type of person the better.

As an example, let's say you build websites for restaurants. Here is a sample of what you would say:

> *"[name], it's been really good to catch up today… I'll stop by the restaurant next time I'm in your neighborhood.*
>
> *"One more thing I meant to ask was if you knew of any other restaurant owners, managers, or team members of any other restaurants in Denver that you think would be open to meeting me and taking a meeting.*

"I'm not looking to pitch them, just trying to expand my network and get to know more restaurant folks in Denver.

"Do you know of a couple of people that would be open to a meeting?"

After you ask the question, let them think for a moment. Don't fill the emptiness.

If they can't think of anyone, consider having a few ideas ready for them. Do a little research ahead of time and have a list of possible prospects from your target market that are top names and easily recognizable.

This can get their wheels turning. Or better yet, they might actually have direct contact with that person and can make the intro.

Once they've identified the list of introductions theV could send you, make sure to make note of who they will introduce and offer up an easy referral email template for them to use.

Make sure they send a "mutual introduction." In other words, have them send an email to the referral and CC you on the message so you can take it from there.

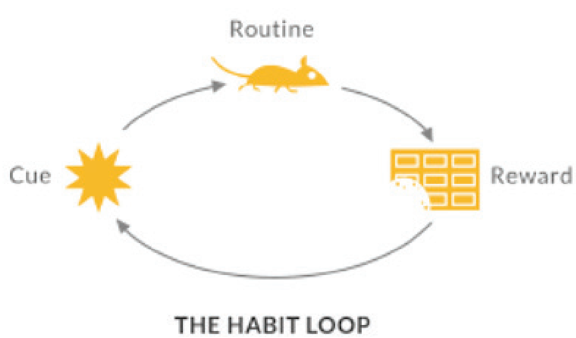
Ask #3: Introduction with referral or commission "carrot"

Another option to help nudge the referral process along is to create some kind of incentive or "reward" for people to refer you.

Creating an incentive does two main things.

One, it gives potential referral partners a reason to take action: some motivation like a commission, or a finder's fee, or even some free help.

Two, it helps to build a habit loop so they do the action again.



(Credit: The Power of Habit: Why We Do What We Do in Life and Business)

A habit loop is made up of three things.

The cue is whatever triggers the habit.

The routine is the habitual behavior you're trying to reinforce. In this case, it's referring you.

And the reward—your incentive—is what convinces the referral partner to keep building and growing their habit.

Understanding these elements can help in understanding how to change bad habits or form better ones.

So as you call names on your list, you can let them know about the incentive—and then work with them to build their own list of people in their network to refer you.

Now, the most common type of incentive is attaching a commission to any business that you book from introductions they provide you.

After all, the thought goes, why not leverage your network as a sales force for you?

Giving referrers a commission on the business they drive to your door—for example, like a fixed percentage like five or ten percent, or a flat fee—sounds super logical.

You don't pay them unless you get paid something. Truly a "win/win," right?

Well, the problem is that this approach rarely helps to build a "referral habit" where your network is actively looking for people to introduce you.

The reason? The amount of time it typically takes to get through a full "habit loop."

Here's the typical sequence:

1. You call and ask for a referral.
2. They find one or two people from their network to refer you.
3. You get introductions and then start your sales process. While it's possible that you turn around a deal quickly, it's also possible that it takes weeks or months before you get your first check. Then even when you get that check, it might be another week or two before you drop your commission check in the mail.
4. Your referrer gets their check in the mail weeks, months, or in some cases, a year or more after they sent the referral.

Good news, though. Through trial and error, I found something that worked a lot better.

The secret is incentivizing the action that you want as quickly as possible.

I knew that over the long-term, if I could build a referring habit into my network then I would gain the most clients.

So I lowered my commission that I offered on new client projects, and added an incentive to the habit I wanted to encourage: getting me warm introductions with people in my target market.

Instead of paying five or ten percent of a ten thousand dollar project, I would pay fifty to one hundred dollars for a warm introduction.

And I would pay this as soon as I got the introduction.

Here was my much more straightforward process:

1. You call and ask for warm introductions.
2. They find one or two people from their network to refer you.
3. You get the introductions and send the money.

The magic is in what happens next…

They realize that was the easiest and fastest couple hundred dollars they've ever made...

So they look through their address book a little harder and magically find you a few more names.

Then:
1. You get warm introductions and pay more money.
2. They think this must be some kind of joke and they dig deeper into their network.
3. And you cheerfully incent them to keep going.

Because the reward is so much more tied to the cue and routine, you'll have a much stronger likelihood of building a referring habit.

Here's a basic view of how this math can work for your business:

Type of agreement	# of leads given	# of leads won	Payout	Project amount	Total payout
Normal referral commission	3	1	10% of business won	$10,000	$1,000
Pay per introduction	7	1	$100 per warm introduction	$10,000	$700

Yes, when I used this method, my upfront costs were much higher.

But most of the time, the long-term costs were lower.

And I found myself building my network much much faster.

In one case, I was working with a liquor rep who was helping me meet restaurant owners. He had sixty clients.

And after he realized he could introduce me and earn $100 for sending an email… My inbox filled up so fast I had to call him and tell him to slow down.

That was a fun call. ("Please! At least give me some time to follow up with the introductions you're sending!")

STEP 3: WORK YOUR LIST, REPEAT, AND TAKE ACTION

Once people get moving on building their list, they often find that it's easy to brainstorm names.

Where I see most of my clients fall down at first is when it comes time to work the list and make the ask.

This is where it's easy to get discouraged and "lock up" and fail to take action. Or let fear of rejection keep you from making that first call.

But this strategy only works if you build your list, choose an ask, and work your list—so you HAVE to do it.

You might think that calling your past clients would be an inconvenience to them.

You might think that no one in your family knows anyone that could be your client because your family is boring or not interested in your business most of the time.

You might think that asking someone for an introduction is "sales-y" or sleazy.

These are all forms of resistance and fear. And they have no basis in reality.

MOST people are hardwired to help out their tribe.

MOST people are ready and waiting for you to ask for their help.

The problem is you just haven't asked yet.

So follow the recipe I've given you.

I've made it as easy as possible. I've laid out the instructions. I've helped you build your list.

I've given you email and phone scripts.

All you have to do…

Is take action—and watch the results pour in.

STRATEGY #2:

THE HOT REFERRAL CLAUSE THAT CAN LITERALLY FILL YOUR INBOX WITH INTRODUCTIONS

What if every client you got turned into at least one other client?

That would mean that you only need to market to get a single customer and you would have a constant stream of new clients.

Now…

What if every client you got turned into THREE?

You'd have a business that was quickly growing—and a client base that multiplied exponentially.

So here's the thing: your clients know other people like themselves. You know this and I do too.

Because almost every business owner, organization director, and team member has a network of other people like them.

The problem—for us anyway—is that many people are protective of their network. And they need an incentive to go out of their way and make introductions.

Enter the Hot Referral Clause.

This is an optional way for a client to get a small discount instantly.

How? By helping you to grow your network, add some social proof and authority to your business, and drive more awareness about your business.

Here's how it works:

- You give your client an instant 10% savings.
- Your client gives you a written and video testimonial and at least three warm introductions.
- In addition, if any of their introductions turn into actual clients, you'll credit back an extra 5% of their project investment.

If your client exercises this optional clause, they're choosing to save money on their project by doing a little work for your business.

I love this tactic because it helps me save on marketing costs by having my clients do the legwork for me.

(And in case you missed it, that's 5% of the referral partner's project—NOT 5% of whatever business you land from the introduction. That protects your upside in a big way if the new project ends up being bigger than your referral partner's.)

This tactic can be hard to swallow at first. When I show it to agency owners, I often get one of two objections:

"I can't bribe my clients to give me testimonials!"

Or "I can't incentivize me to refer them!"

But you're not bribing them. First, you're not asking for testimonials you don't deserve.

And second, taking the time to record a video testimonial is a pain in the rear. And sending three introductions to potential good fits takes time and effort. You should be happy to pay your clients in exchange for the value they're providing you.

And as for "incentivizing" them…

I'd much rather pay my clients instead of Mark Zuckerberg and his Facebook ad machine.

Now to be fair, I do get one other objection to this strategy.

It's about the percentages I start with: a base 10%, and then as much as another 15% if three real clients coming from the introductions.

But these are my numbers. If the numbers are truly the thing that's keeping you from implementing this tactic, then CHANGE THE NUMBERS.

However, if getting clients and marketing your business is your #1 problem right now, then it's already your costliest problem. It's the most expensive issue your agency faces.

You're already losing money because of the lack of clients flowing into your business!

Why don't you start making investments in your marketing... And see what happens?

Here's how.

STEP 1: ADD THE CLAUSE TO YOUR PROPOSAL AND/OR CONTRACT

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REFERRAL DISCOUNT

We love getting referrals. We love them so much we're willing to give you a 10% discount in exchange for three warm introductions, a written testimonial, and a video testimonial. If any of your warm introductions turn into new clients, we will credit an extra 5% back to your account for each client. That means in total, you could save 25% of your investment for this project.

Initials

Yes! I commit to sending you at least three (3) warm introductions, a video testimonial, and written testimonial for an **INSTANT 10% savings** and an **extra 5% savings for each referral that turns into a client** for a maximum potential savings of 25% of my total project investment.

End Clause Text

Example of where to add it in your proposal or client contract:

Email: [YOUR EMAIL ADDRESS]

INVOICES

Payment is due upon receipt of invoice. You may not withhold any amounts due and we reserves the right to cease work without prejudice if amounts are not paid when due.

PAYMENT

Payments are due upon completion of deliverables. If you delayed the execution or performance of a deliverable we reserve the right to make payments due upon the estimated due date.

Deliverable	Amount ($)	Estimated Due Date
Agreement Signing	11,425.00	[MONTH] [DAY], [YEAR]
Design Approval	5,712.50	[MONTH] [DAY], [YEAR]
Sign Off	5,712.50	[MONTH] [DAY], [YEAR]

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TERMS & CONDITIONS

This website proposal incorporates the website proposal terms and conditions provided online at http://www.hotpressweb.com/website-proposal-terms-and-conditions and form a binding part of this agreement. You acknowledge you read, understood and agree to the terms and conditions.

ENTIRE AGREEMENT

This document together with any attachments, as well as any new, different or additional terms, conditions or policies which we may establish from time to time, and any agreement that we are currently bound by or will be bound by in the future, constitutes the complete and exclusive agreement between you and us concerning your engagement of us on this project, and supersede and govern all

Steps to implement this into your business:

1. Add this clause to EVERY proposal you send.
2. Review the clause with your prospective client during your proposal presentation.
3. Explain expectations around how easy it will be for your new client to refer you. It's a no-brainer to save 10%.
4. Handle common objections:

    a. "You don't need to pay me or discount my project in order for me to give you a testimonial… I can't guarantee that I'll give a testimonial."

    i. "We will never ask for a testimonial that we haven't earned. But we also realize it takes time to put together a quality testimonial and case study. We value your time and we're happy to compensate you for it... Just like you're paying us for our services.

    b. "I'm happy to send referrals without a discount…"

    i. "And we'd love to get referrals long-term—above and beyond what this option says. But we value your time and your network and want to make it easy and worthwhile to help our business grow... Just like we're helping your business grow. We've done such a great job with our clients that many that have taken advantage of this discount go on to refer us for many years to come without any additional project benefit."

    c. "What will I say to people that I introduce?"

    i. "We'll provide an email script to make it super easy to send the warm introductions."

    d. "What will I say for the testimonials?"

    i. "We'll prepare you with questions and a template for the testimonials. We promise that we'll make it super easy for you."

    e. "What if I'm no good on video or don't have a professional camera?"

    i. "A simple camera phone or webcam video is sufficient. And the more 'you' that you are, the better."

    f. "How will I know if I want to refer you or give you a testimonial, we haven't finished the project yet?"

    i. "You don't have to wait until the end of the process for a testimonial. You can recommend our reputation, our sales process, the value you got during project kickoff, or many other pre-launch project steps. You've just made a great decision—and we always deliver. And let's not kid around—getting introductions from you will put even more pressure on us to deliver for you."

5. Add deliverables to your project setup process checklist.

    a. Don't wait for your client to initiate. Treat the 3 deliverables (introductions, written testimonial, and video testimonial) as deliverables in your project.

    b. Take each of these deliverables super seriously, just like you treat every other aspect of your project scope.

    c. Schedule a meeting to get the introductions. You'll want to talk with your new client about their network and brainstorm about who will be the best fit to introduce you to.

    d. Schedule a meeting to set a plan for your testimonials. If you want to capture a testimonial about your sales or discovery process, you can set that appointment right away. If you want to grab a testimonial about your project process, then you can schedule it for during your project. If you are looking for a testimonial about the results or end product, then schedule that meeting for after you know you'll be done.

STEP 2: GET YOUR THREE INTRODUCTIONS

Make sure to have a short meeting with your client to set your game plan for getting the three introductions they've promised. Plan for 15 to 20 minutes.

This will help them brainstorm who would be a good fit and who might not work. It will also make sure you can provide them with any resources or swipe content that they need.

Why a short call?

Because having your client send you introductions is kind of like having them sell for you. And a LOT of people are uncomfortable with selling at first. (Just like you once were… or maybe still are!) So you'll likely need to coach them a bit on how to approach sending you a warm introduction.

Here is an example email that you can give them to send you the introduction:

Start Warm Intro Script

Hey [referral name],

I wanted to introduce you to the owner of the digital agency we just hired, [your name]. He/She's helped me ___ and ___. And I know he/she could help you—and would be a great person to have in your network.

[Your name], meet [referral name]. [Insert 1-2 line background]

[referral name], I know you would benefit from working with [your name] because he/she can help you ___ and ____.

I'll let the two of you take it from here.

Talk soon!

YOUR NAME

End Warm Intro Script

To make it work, give your client simple instructions. All they need to do is personalize this message, make it fit their voice and style, and then send the email introduction to the person in their network and "CC" you on the email.

I highly recommend that you have your client do all of this work in a single sitting—or at most over a couple of days.

Since your client will get an additional discount if their introductions turn into actual clients, let them know that if they have more than three introductions available to send, that will increase their odds of getting additional savings on their project.

Let them know also that you've had clients refer a half dozen or more people as a way to help them get additional savings on their project investment.

Finally, make sure to thank them for their time—and tell them how much you value their help with growing your business.

STEP 3: GET YOUR TESTIMONIALS

When getting testimonials, most people say something like this to their clients:

"Do you mind providing me a testimonial?"

Their client agrees because that's just what most people do. Then they go and sit in front of their keyboard or camera phone and freeze. They don't know what to say or how to say it. They'll try to think about what a good testimonial sounds or looks like and will muddle through it.

Likely they won't be super happy with what they say.

Not because they aren't excited to say nice things about you.

But because asking someone for a testimonial is a big request. And it's too broad. Too general.

Your client will feel uncomfortable writing or recording it, and you'll likely not get what you really want.

What you want is *their story.*

Stories have a beginning, middle, and end. They have an "Act I, Act II, and Act III" structure.

Steven Pressfield, best-selling author and story guru, turns this into a simple framework that you can use for written and recorded testimonials:

- **Hook:** Grab their attention and build tension.
- **Build:** Build up the tension with what happened.
- **Payoff:** Release the tension with the end result.

This structure can be used to apply to a short three sentence testimonial or a 10-minute video story.

Here is a written example using this structure:

"Before we met Brent, our website was embarrassing.

"After interviewing more than a dozen firms, we chose his agency because it was obvious they get results.

“After interviewing more than a dozen firms, we chose his agency because it was obvious they get results.

“We just launched our website and instantly got amazing feedback from our clients—I’m finally proud of our website.”

What I highly recommend is that you have your client agree to allow you to write the testimonial based on answers to a few questions… Then have them approve the language, voice, and angle before you lock it in and start using it in your business.

Instead of merely “asking for a testimonial,” ask your client specific questions on a call or over email and then use the BEST of what they say in a single testimonial.

Here are some questions to help that process:

- What were some of the problems and issues you experienced before you reached out to us?
- Can you tell me what these issues were costing you in tangible terms? How about emotionally?
- Why did you choose our agency?
- What did you like about our process during our project?
- Was there any team member or interaction that you enjoyed more than others?
- What impact has this project had on your business? Tangible result? Emotional result?
- What would you tell someone that is considering hiring us?

From the answers to these questions, you’ll be able to create a compelling testimonial and/or case study.

Not only that, but this exact same structure and approach work for video testimonials as well.

Here’s an easy way to do video: schedule a short video conferencing call with your client. Then ask them these questions on video, and have a video editor cut their best answers into a short video testimonial clip.

You could even take that process and put some more pizzazz on it like these testimonials:

https://www.youtube.com/watch?v=ycbsxybfWVI

https://www.youtube.com/watchv=pcBWnEifb40

Now, before you think that you need to fly across the country (or the world), you can use a service like Smart Shoot (https://smartshoot.com/) to hire videographers that are local to your clients. Give them the above questions—for a few hundred bucks they’ll go on-site and record a high-quality video for you (and edit it if you need!).

Whatever you can afford to spend on your testimonials, once you have them, you’ll have a marketing asset for life.

And when your next client sends warm introductions, you can respond and include a “Results” page from your website that has a collection of fantastic stories about how awesome you are.

Now you’ll have a SYSTEM and referral engine to help you get more clients with every single new client you get into your business.

Referrals won’t be left up to chance anymore.

STRATEGY #3:

"ICE CREAM VICTORIES" AND THE "SELF-REFERRAL" METHOD

I love showing agency owners how to ink high-value deals.

And because of that, I've helped thousands of agency owners land massive deals for their business.

$10k deals… $25k deals… $100k deals…

I've even had a customer tell me that our program helped him land a sale for $500k!

(Trust me, that surprised me too!)

Big deals are fun. DEFINITELY worth a big celebration.

But there's also something to be said about small, quick and easy, and insanely profitable deals.

I call these my "ice cream victories."

Ever landed a deal where you get paid $997 for a few hours of work?

Or $2497 for an honest day at the computer?

You can't buy a Tesla with the proceeds of these little deals...

But you sure can celebrate by taking the family out to ice cream after dinner.

And THAT matters.

#icecreamvictories

Ice cream victories are the little deals that fill the gaps in your pipeline.

They help you build momentum and confidence.

And, in turn, that confidence will help you show up to win the bigger deals.

But more important, these ice cream victories can tie nicely into your referral engine strategy.

You can use these small packages to gauge interest from existing clients, to get hot prospective leads, and possibly even to sell your referral partners themselves! (More on that soon.)

That's why this strategy might be my favorite...

First, because it involves getting income as soon as TODAY.

But second, because it also involves ice cream. And who doesn't go crazy for ice cream?!?

In any case, there are two steps to this process.

First, you need to come up with a small, low-commitment package that is highly relevant to trends and needs.

Then you need to call all of your existing and past clients and ask them if they know anyone that is interested in those packages.

STEP 1: BUILD YOUR PACKAGE OR PACKAGES

The first step is to spend a little time brainstorming two or three service options that hit a couple of different price points.

Depending on your core offering, this will vary. But the essence of these packages should be the same: high-value for the client, but easy and profitable for you to implement.

You should be aiming for packages that would take you a half-day to a full day to deliver.

One more thing to keep in mind: try to make the packages relevant and anchored to some external urgency.

As I write this, there are several holidays and shopping events just around the corner: Thanksgiving, Black Friday, Cyber Monday, Christmas, and New Years.

Here are some examples based on those holidays:

Cyber Monday Email Campaign, $997

Offer to work with your client to make a simple email promotion campaign to promote their products or services. (You might think Cyber Monday is reserved for businesses with products, but we've sold over seven figures of services using this day to build hype and urgency.)

Example Scope

- 40-minute consultation session to come up with an offer
- Write 3 emails
- Manage and execute the campaign
- 20-minute results call to review campaign performance and talk about next steps

Holiday Microsite or Landing Page Funnel, $2,497

Offer to build a microsite or landing page funnel for your client.

While most clients know they probably need a full website update (unless you just did that for them), they might not be ready to make the investment. But they might have specific marketing needs for a short-term campaign for the holidays.

This is huge for e-commerce companies—where they can feature all of their holiday specials and deals. But it can also be significant for any service company.

Example Scope

- 1-hour consultation session to map out campaign
- Build microsite or landing page funnel with up to 3 pages
- Write content
- Test microsite and/or funnel
- Launch microsite

STEP 2: CALL YOUR CLIENTS AND YOUR HOT REFERRAL LIST AND MAKE THE OFFER

If you've never called your existing client list and offered up a small package before, then I'll be blunt—you're missing out.

When I'm working with agency owners, they often resist going back to their past clients because the last large project they worked on was stressful and a lot of work.

For some reason, that experience sits in our minds, and it starts to become a lot easier to think "Well if our past clients need us, they'll let us know."

Well, remember how I learned that all of my referrals happened when I was "top of mind?"

Same thing here.

Your clients might not be thinking about a Cyber Monday or holiday campaign. But you can call them and suggest it—and you'll be surprised at how many people THANK YOU for reaching out... Even if they don't take you up on the offer.

(I can't tell you how many times I would reach out with these small packages only to find my client had a BIG NEED they just hadn't gotten around to telling me about. One time I called a client with one of these offers and they ended up having a HUGE project they were already getting a competitor's bid on... Because they didn't know I did the service!)

Once you have your small package designed and bulleted out, call your existing clients to ask them if they know anyone that would be interested.

I love this approach, and I think you can guess why…

You're not directly asking THEM if they're interested… But if they are THEMSELVES, you can bet they'll let you know.

You'll find that although some of your clients might not be in the market to make a sizeable investment right now…

They might very well be open to buying from you again.

By creating small packages, you give your regular clients a low-risk, low-commitment way of doing more business with you.

I bet you have clients RIGHT NOW that are waiting to spend more money with you. You just need to tell them how:

> *"Hey [firstname].*
>
> *"Here's the reason for my call today: we're getting great results for a few of our clients with some end-of-year campaigns. I wanted to see if you knew of anyone that might be interested in the same thing.*
>
> *"I have two packages—one is a Cyber Monday campaign, the other a holiday microsite to promote end-of-year specials instead of having to build that into an existing website.*
>
> *"Do you know of anyone that might need our help with something like this?"*

By asking for advice, you give your client the opportunity to self-select into your offer.

Essentially, they will refer themselves instead of suggesting others.

And yes—they might even refer others who are a great fit, too!

STEP 3: CREATE URGENCY AND STACK THE WORK

Put your efforts into your own campaign by setting a date in which your clients need to make a decision.

Give yourself a two-week window to connect with all of your clients. Tell them that you're making this offer for a limited time so you can guarantee the work deadlines in order to hit their schedules.

This will help you create urgency—which some people need in order to make purchasing decisions.

It will also allow you to stack these smaller deals into a fixed window to do production and delivery.

So while these deals might be smaller in scope, you can stack four to five of them, add ten thousand or more in end-of-year billables, and get some efficiencies out of doing several of them together.

There's only one rule when you win these deals—you have to promise me you'll go get a scoop or two of ice cream when you ink your first one :-)

UGURUS

THE ULTIMATE REFERRAL ENGINE KIT