

## **Referral Ask Script Pack**

Use these word tracks to confidently ask for referrals at different stages of the client relationship.

### **During Appointment (Soft Ask)**

"If today's plan makes sense, who else comes to mind that might appreciate the same kind of help?"

### **After Policy Issued**

"I love helping people the way we helped you—if someone you know could use a review like this, I'd be glad to reach out."

### **Post-Review Check-In**

"It's always easier to work with people referred by great clients like you. Who's one person you'd feel comfortable introducing?"

### **Milestone Follow-Up (6 Months Later)**

"Glad to see everything's still working for you! Anyone in your circle who'd benefit from a quick coverage check-up?"

### **Quick Tips for More Referrals**

- Ask when clients feel most satisfied—after a win or good service.
- Keep it casual—confidence beats pressure.
- Track asks and referrals in your CRM.
- Always send a thank-you note for referrals.