



REFERRAL EMAIL

EXAMPLES

Example #1 — Reaching Out to Someone That Knows You to Ask for a Referral

SUBJECT: JEN - ANYONE YOU THINK I MIGHT WANT TO CONNECT WITH?

Hi Jen,

I am getting into new business mode as I start thinking about the second half of 2016. Since you know me quite well and a bit about what I do, I thought I'd send a quick note to see if you could think of anyone that I might want to talk to. I'm looking for up to three new clients for the remainder of the year. Quick snapshot of what I'm looking for:

- A food or beverage company, in either manufacturing or distribution, with as few as 50 and up to 500 employees.
- CFO, CEO, other senior leaders that particularly care about risk management and worry about liability and things slipping through the cracks based on significant changes and/or growth.
- Open minded leaders who believe in what they do, are reasonable people and fun to work with.

Anyone come to mind worth connecting with? As you know, my style is casual and consultative and I'm never aggressive when it comes to new business introductions.

I find it never hurts to have exploratory conversations tee'd up by people that know me well. If no one comes to mind, that's perfectly fine, no pressure or expectations at all. I look forward to seeing you later this month.

Regards,

Ken



REFERRAL EMAIL EXAMPLES

Example #2 — Reaching Out to Someone That Knows You to Ask for a Referral

SUBJECT: KATH - ANYONE YOU THINK I MIGHT WANT TO CONNECT WITH?

Hi Kath,

I am getting into new business mode as I start thinking about the last quarter of 2015. Since you know our team performance products quite well and a bit about what I do I thought I'd send a quick note to see if you could think of anyone that I might want to talk to. I'm looking for a few more organizations that fit the profile of:

- Having team-based cultures
- Looking for a single, overarching team development model
- Are mid to large biotech/pharma companies

Anyone come to mind that could be worthwhile connecting with? As you know my style is casual and consultative and I'm never 'selling' anyone I get connected to. I find it never hurts to have exploratory conversations tee'd up by people that know me well. If no one comes to mind, that's perfectly fine, no pressure or expectations at all.

I trust all is well and look forward to catching up soon.

Victor



REFERRAL EMAIL EXAMPLES

Example #3 — Reaching Out to Client That Knows You, Asking for Referral

SUBJECT: ROBIN – QUICK NOTE FROM BOBBY PAGE (RE: ANYONE THAT I SHOULD TALK TO?)

Hi Robyn: I am getting into “new business” mode as I start thinking about the rest of 2017. Since you know me and what GRP Group does quite well, I thought I’d send a quick note to see if you could think of anyone that I might want to talk to in your organization. I’m looking for clients that fit the profile of:

- HR and OD leaders that are facing large organizational change processes and/or are beginning to make strategic plans for the next 3-5 years for their organization.
- Leaders who are open to different approaches (e.g. visual methodologies) to traditional strategic planning and communication rollouts.
- Leaders who struggle with keeping their planning/change process focused, energized and moving.

Anyone come to mind that could be worthwhile connecting with? I find it never hurts to have exploratory conversations tee’d up by people that know me well. If no one comes to mind, that’s perfectly fine.

I trust all is well and look forward to catching up soon. If you’re open to a quick call as well, let me know a date in the next week or so that you would be available.

Best regards,

Bobby



REFERRAL EMAIL

EXAMPLES

Example #4 — Reaching Out to Get a Referral From Someone That Knows You Very Well (Short Version):

SUBJECT: JOE – TOM B NOTE RE: NEW BUSINESS

Joe – You know me and my business well. I'm open for one or two more new clients between now and end of the year. Anyone come to mind that you think I should talk to?

Tom



REFERRAL EMAIL

EXAMPLES

Example #5 — Asking a Client for Referral in Advance of a Meeting (Short Version)

SUBJECT: KEVIN – TOM B NOTE RE: OUR MEETING/NEW BUSINESS

Kevin - Confirming our 1:30 meeting Wednesday. I thought I would plant a seed in advance. Anyone you think might be interested in what I do – worthy of a mutual introduction? No pressure at all. See you Wed. Tom



REFERRAL EMAIL EXAMPLES

Example #6 — Asking a Client for Referral in Advance of a Meeting

SUBJECT: QUICK NOTE FROM AARON WAYANS – CONFIRMING MEETING

Susan & Bob,

I'm looking forward to seeing you both this coming Thursday at 2:00 p.m. In addition to investment performance, we'll take a fresh look at your Strategic Plan and touch base on a few planning areas that are relevant to your retirement transition.

I'd also like to see if you have any colleagues or acquaintances that might be interested in the work we do around here. My best new clients, it seems, tend to come from my best existing clients, so I can't resist asking you the question. No pressure or expectations whatsoever. If you know someone that you'd be willing to make a direct introduction to, great. If you don't, that's perfectly understandable.

See you soon,

Aaron



REFERRAL EMAIL EXAMPLES

Example #7 — Reaching Out Without a Direct Email Intro Being Made

SUBJECT: KATIE - DANA GARAVA SUGGESTED WE TALK

Hi Katie,

I had a lunch meeting with Dana yesterday and she suggested it might make sense for us to connect. She thought that our Winery Benefits Pool that they participate in could be something worth taking a look at.

I have no idea if this is relevant or of interest, but I thought I'd reach out at Dana's suggestion. If you're open to it what I'd suggest is scheduling a brief conversation (live or via phone). We can give you a sense of the program and who we are and we can decide if there is any reason to talk further (or not). No pressure or expectations at all.

Let me know if you're open to schedule a quick chat. If you're not open to talk that's perfectly fine, just let me know either way. —Kelly



REFERRAL EMAIL EXAMPLES

Example #8 — Reaching Out When You Have a Common Connection But No Direct Intro Has Been Made

SUBJECT: JOHN - DAVID DIBELL SUGGESTED WE CONNECT

Hi John:

My name is Mike Fletcher. I am a friend and business associate of David Dibell at Merrill. David continues to speak very highly of you and suggested that I reach out. Real quick, here's why I'm writing.

My company is a commercial insurance brokerage firm based in San Francisco with that specializes in Directors & Officers Liability Insurance. We represent over 350 public companies (including EBay, Amazon and Netflix) and over 40% of the IPOs in California in the past six years. We have a particular approach to analyzing and minimizing risk for soon-to-be public companies.

I have no idea if we'd be a fit for MarinSoft but thought I'd reach out to see if you'd be open to schedule a brief, 5-10 minute phone conversation. At the end of the call we should have a good idea if it makes sense to keep talking (or not).

If you're open to talk, let me know if there is a time in the next week that would work for you to schedule a quick call. If for some reason you're not open to talk all that I ask is that you let me know either way.

Regards,

Sam



REFERRAL EMAIL EXAMPLES

Example #9 – Following Up If You Haven't Heard Back From Someone That You Got Connected To

SUBJECT: STEVE – QUICK FOLLOW UP FROM MARGARET STARK (TJ CONNECTED US)

Hi Steve,

TJ thought it might make sense for you and I to connect. I followed up via email last month at your suggestion and didn't hear back. I saw your WSJ article back in April, where you said Linknet is hiring 300 people this year, so I'm sure you are SUPER busy.

If you're open to it, what I suggest is that we schedule a brief, 15-minute call in the next week or two to give you a quick overview of our learning and development programs and see if there might be any kind of fit. At the end of the call we should have a good idea if there is any reason to talk further, or not. No pressure.

Let me know if you're open to talk and if there are best days/times that might work a brief, scheduled conversation. If you're not open to talk, all that I ask is you let me know either way.

Cheers, Margaret



REFERRAL EMAIL

EXAMPLES

Example #10 — When You Do Get a Warm Referral Email Introduction

SUMMARY EXAMPLE: DIRECT INTRODUCTION:

David, Nice to meet you by e-mail. Not sure I can help, but always open to explore. Let me know if you want to schedule a brief 15-minute call and we can see if there's any kind of fit.

Pamela



REFERRAL EMAIL EXAMPLES

Example #11 — When You Do Get a Warm Referral Email Introduction – Help The Referrer With an Email Template

Hello Jaque,

Thanks for the offer of connecting me with Carol.

Since you have a million things going on I thought I'd draft an example of the kind of email intro that I find works well in situations like this.

Take this and use it as-is or edit it as you like (see below). Or you can of course do your own thing. CC me on the email and I can take it from there.

Thanks in advance, Jesse

REFERRAL INTRODUCTION EXAMPLE:

Carol,

Jesse Watt, from NextStep, is a strategic partner I've worked with for a number of years. I trust him and they do really good work.

I thought it might be worth having a conversation to see if any of their team development model and system could be a valuable resource at some point.

I don't want to meddle in your business and don't want you to in any way feel obligated to talk to Jesse but I thought it would be good for you all to know each other just in case there might be a fit at some point.

I'll leave you two to figure out if it makes any sense to talk further.

Jacque



REFERRAL EMAIL EXAMPLES

Example #12 —Ideal Example of a Referral Introduction (Made by Client to Prospect)

Hi Cindy,

How are you? I hope that all is well with you and at HCV.

I think you know that I am now at PathWays (my two year anniversary is coming up!). I miss HCV, but PathWays is a great experience for me. One of the things I love about it is all of the new tools I have been exposed to. One in particular I wanted to share with you. I am regularly using the Drexler Sibbet Team Performance Model in my team effectiveness work. I was able to influence PathWays to license it as our enterprise wide model for team effectiveness. I frequently wish that I had known and used the Model at the HCV as I have seen it have a powerful impact.

I wanted to connect you with Phil Wilson (copied on this note) with Jet Consulting. He has been a great partner for me in this space for the past two years. I trust him and they do really good work. I thought it might be worth having a conversation to see if their Team Performance Model/System could be a valuable resource for you at some point.

I don't want you to in any way feel obligated to talk to Phil (I don't usually make these connections) but I have become a big fan of the Model and thought it might be good for you to have him as a resource just in case.

Please let me know if you ever want to get together for coffee!

Pat



REFERRAL EMAIL EXAMPLES

Example #13 — Another Good Example of Referral From Client That Knows You

Hi Stacey,

I know you are heading out on vacation soon and I wanted to facilitate an introduction before you do!

As you know, I have used the Impact facilitation materials for many years, including the team assessment tools. Given the current dynamics in your functional area, you might want to tap into a local resource down the road.

Richard Lesh, at Impact is a strategic partner we worked with at Sommerset. (I believe you were part of the team effectiveness rollout when you were there.)

Richard: Stacey is involved in the management of the project management team at BioSect and is a longtime colleague.

I thought it might be worth having a conversation to see if any of their team development Model and system could be a valuable resource at some point. I'll leave you two to figure out if it makes any sense to talk further at some point.

My best, Gabby



REFERRAL EMAIL EXAMPLES

Example #14 — Good Example of a Referral Email and Follow-up

Stan,

Joe Feingold from Wilson Solomon here in San Francisco is a strategic partner for some of our other holdings. I trust him and they do really good work. I thought it might be worth having a conversation to see if any of their Construction products and consulting could be a valuable resource at some point. I don't want to meddle in your business and don't want you to in any way feel obligated to talk to Joe and WS&Co but thought it would be good for you all to know each other just in case there might be a fit at some point. I'll leave it at that.

John



REFERRAL EMAIL

EXAMPLES

Example #15 — Good Follow-up to Previous Email:

Stan. Per John's note, let me know if you'd be open a brief call or meeting. I have no idea if there are ways that we might help but it could be worth a brief, no obligation conversation. Let me know if you have 20 minutes in the next couple of weeks. If you're not open to talk, that's perfectly fine. Just let me know either way. Joe



REFERRAL EMAIL EXAMPLES

Example #16 — Follow-up With COI Who Had a “Hot” Prospect a Few Months Back but Never Made the Direct Intro:

SUBJECT: FOLLOW-UP RE: CLIENT REFERRAL (?)

Sharon,

Per our last interaction below, I thought I'd follow up. (Persistence is part of my charm....)

It seems to me that there are ways in which we could help him. If you're open to it, it might make sense to send a short introductory email. Below is an example that you could use if it is at all helpful. If this isn't a good time or you aren't comfortable making the connection, I completely understand. Just let me know either way. Aaron

"Aaron Wasserman (copied) is someone I share clients with and trust implicitly. His firm, BSI, is an independent wealth management firm that is sharp, thoughtful, and an alternative to the broker-dealer model. I think it might be worth your time to have a brief conversation with them. I'll leave it to you two to decide if it makes sense to connect."



REFERRAL EMAIL EXAMPLES

Example #17 — LinkedIn InMail Outreach Example When You Want Someone to Make an Introduction to a Prospect.

DJ – Would you be willing to make an introduction (LinkedIn or email) to Steve J from Sontech? Seems like some of what we do might be relevant and since you know me well I thought you might be willing to make an intro. No pressure or expectations. Let me know either way. Matt

Joe – I see you and John Thomas are connected on LinkedIn. Do you know John well? Seems some of our newest Cyber products could be a fit for his department. Let me know if you'd be willing to make an intro and if I can provide any more information. I find a direct email introduction is always most effective if it's something you're willing to do. Let me know either way. Thx. Mary



REFERRAL EMAIL EXAMPLES

Example #18 — LinkedIn Outreach Example When You Have Someone in Common With a Prospect

Hi Steve. My name is Tom Jacks. I see we have DJ in common. He's a longtime client and friend of mine. I run XYZ organization and thought I'd reach out to see if any of what we do might be relevant in your world. Let me know if you might be open to a brief phone chat to find out. If not, that's fine too just let me know. Tom

Kristy – Mike Fasone here. I enjoyed your talk at the Apex conference last week and thought I'd see if you'd be open to a five minute call. Bill Simmons is a common connection of ours and keeps telling me we should know each other. You have time for a five minute chat on Friday or Monday? Could be some partnership opportunities. Mike