

How to Generate Referrals and Testimonials for Your Business

BY ANNE SCARLETT, LEED AP

Third-party endorsements can help you land more work, and asking for them is not as difficult as you might think.

SIMPLY “DOING GOOD WORK” will not keep your firm in business. These days, clients expect nothing less than good work, quality solutions, stellar customer service, fair pricing. So, delivering on promises does not automatically result in clients singing your praises from the mountaintops. But your good work is not for naught; there’s hope! Doing good work—*supported by testimonials and referrals*—will get you new clients and help to grow your firm.

So how do we get our clients to recommend our firm to new prospects? And further, how do we get our networking contacts (with whom we have never worked directly), to refer our firm when they hear of an opportunity that makes sense?

Let’s start with getting recommendations from existing clients.

1. Capitalize on specific quotable statements. When I conduct business development planning audits, I always ask to review my clients’ testimonials. They often pull out a folder full of hardcopy letters from their clients. Those letters are terrific, but how can they be used effectively in your marketing materials? (And no, I do not think sticking the entire letter(s) at the back of a proposal is the best route.) Pull excerpts from those letters. Then, confirm with the author that you have permission to use their quote out of its original context.

2. Don’t wait until the end of the project to ask for a referral. I know this is tempting. You want to demonstrate that you can do a great job, and you feel pushy about asking for something before you’ve reached 100% project completion. But let’s say that you’ve reached the end of an initial phase, and you know the client is satisfied (they told you so).

How about saying: “It’s been a pleasure to serve you so far. We’re proud of what we’ve accomplished to date, and will take every measure to continue this level of service. If you’d feel comfortable, we’d be grateful to have an in-progress statement from you, and/or we hope that you’ll consider suggesting our firm to any non-competitors for whom you think we could also be of service.”

3. Make them feel comfortable and confident in referring you. I saw a brilliant example of a professional (<http://recommendjohan.com/>) who prepared a brief document to educate clients on how to make a referral on his behalf. Components included: Who benefits most from our services; Things to listen out for; What happens when you put someone in touch with our firm; etc.

4. Make it easy for clients to articulate their thoughts. That same professional has a landing page on his site to submit testimonials. Rather than facing a blank slate, he provides his clients with prompts to round out their submissions: What were the main concerns you had before hiring our firm? What did you discover when we started working together? Would you recommend me to others, and why?

5. Send handwritten notes every time you get a testimonial or referral. Without fail, send a thoughtful, detailed handwritten note (these are much appreciated and *always* get read) to thank the person that mentioned your firm.

6. Be willing to ask, or you may not receive. Even your most appreciative of clients are busy and preoccupied. Conversely, if they have a call-to-action from you—such as your request for a referral or testimonial—they are more likely to offer it up.

7. Capture—and formalize—all compliments that might otherwise slip through the cracks. How often have you or your colleagues casually received kudos from existing clients—perhaps in an email, phone conversation, or over a beer? When you received those kudos, how many times did you capture them formally, to be re-purposed for marketing to other prospective clients? Even when they receive props for an effort well done, AEC professionals seem to be notoriously shy about asking for something more official, such as a quotable statement or recommendation letter. To take full advantage, create a system for every person in your firm to easily capture and formalize compliments at each opportunity. Think of them in terms of soundbites: fairly short



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phrases that are direct and memorable—maybe one key phrase, maybe one powerful, results-oriented paragraph. Consider bringing your staff together in one room to recall recent feedback from everyday oral and written communications with clients. Here are some suggested approaches:

- ▶ “Thanks; your feedback means a lot to me/our firm. In fact, how would you feel about us turning your statement into a testimonial for marketing purposes?”
- ▶ “We are so pleased that you feel that way. Clients like you make me happy that I chose this profession! Would you be comfortable if we used your comment in our future marketing materials so that we can attract more clients of similar nature?”
- ▶ “I know we’re just out having a casual drink after a long day of meetings, but what you are saying about our performance really is essential to why we are in business. Perhaps it would be ok if I paraphrased what you’ve said to craft a more formal testimonial? We would run it by you for permission first, of course.”
- ▶ (If they just say “great job today!”) “You’re so welcome; I’m glad you think so! Can you expand further on why that performance/communication/solution/etc. is valuable to you/your organization?” Once there’s a response, follow with: “I know our firm would really appreciate the chance to use your comments as a testimonial for our marketing materials. How would you feel about that?”
- ▶ “I’ve been telling the marketing director at our firm about how well this project is going. We’re all really glad that you were pleased with the turn around after XYZ issues that we faced. She would love a testimonial from you, and I was wondering if I could share what you said to me last week?” Or, “I was wondering if she

could give you a call to hear your feedback directly?”

The scenarios depend upon the context of each situation. Maybe it’s as simple as a junior staff member receiving a compliment from a vendor regarding a particular drawing detail and specification. Maybe it’s complex, such as a client that was on-the-edge because a project that almost went south, but then was resolved thanks to your firm’s guidance.

Getting Referrals From Your Network

Because many people in our far-reaching networks have not yet experienced working with our firm firsthand, they are going out on a limb to connect us with prospective clients, much less to actually *recommend* our firm. Yet, this happens often, as we forge trusting business relationships and strive to serve as lead sources for one another. Just like with existing clients, you must keep it as simple as possible with these steps.

1. Specific is terrific; vague is the plague.

Don’t make others guess what type of clients your firm seeks. Instead, cite company names from your prospect list. As well, be very specific about what your ideal client “looks” like: core competencies, size, sector, etc. This specificity may spark an idea for a new connection.

2. Be prepared to name step(s) they can take. It’s your responsibility to think creatively about how your network can best help in each scenario. Maybe it’s an electronic introduction. Maybe it’s a well-timed phone call. Maybe it’s a bit of intelligence-gathering. Be ready to request specific step(s), rather than just a loose “*Can you help somehow?*”

3. Make a personal commitment to frequently connect people. It’s unrealistic to expect others to refer your firm if you do not do your own part to be an active referral source. This effort will eventually come back to you, but be patient. For you to be a great lead source for others, you need to ask these two questions of them: “*When I’m out networking, what might I hear from others that should make me think to suggest your firm?*” And, “*How can I help?*” Re-state what they’ve said, so

you know when and how you can best refer them. Sometimes, you may not feel comfortable endorsing another firm with whom you’ve had no experience. No problem! In those cases, you can simply make introductions, and then let them handle it from that point further. An introduction is still a great gift; an endorsement must be earned.

To sustain—and grow—your business, testimonials and referrals are essential. Do everything in your power to be a good referral source and connector. Make it easy for others to do the same, and always acknowledge the efforts—large and small—that clients and contacts make on your behalf. **MSC**