

# 5 ways for sellers to get more referrals & warm intros



# 91% of customers say they would give referrals, yet only 11% of sellers ever ask for them.<sup>[1]</sup>

Most salespeople know that referrals are the best source of deals. They're easier to book meetings with, more likely to close, and often spend more money that deals from other sources. It's not just something you need to know with a gut feeling, the data backs it up.

**84%**

of b2b buyers kick off their buying process with a referral.<sup>[2]</sup>

**16%**

higher lifetime value on referred customers vs non-referred.<sup>[3]</sup>

Referred customers are

**40%**

more likely to make referrals themselves.<sup>[4]</sup>

**3.6-20x**

higher conversion rate on referrals vs leads from cold sources.<sup>[5]</sup>

**73%**

of executives prefer to work with sellers referred by someone they know.<sup>[6]</sup>

Companies with referral programs experience

**86%**

more revenue growth than peers without.<sup>[7]</sup>

With cold outbound being harder and less effective than ever, you cannot afford to have your sellers be among the 89% of sellers who never ask for referrals.

This guide contains actionable tips, messaging, and templates to make it easier for your sellers to start leveraging referrals and warm intros to book more meetings and fill your pipeline more easily.

Some of these suggestions may seem stupidly simple, but that's exactly the point! These are simple mindset shifts and steps any seller can implement today without any tooling or process changes.



# 5 actionable ways for your sellers to get more referrals.

Many sellers seem to lack the confidence and belief that buyers will be willing to make referrals for them. It all starts with a mindset shift. When you do a great job, deliver value to your relationships and back up your words with actions you earn the right to ask who else you could be helping.

Start implementing these simple actions and start seeing more warm pipeline today.

## 1. Just start asking.

### a. ASK PROSPECTS

We've all been there. You've got an excited prospect, you've treated them well, they love what you're selling, but for whatever reason the deal won't progress. Maybe it's timing, or budget, or some other reason. This can actually be the perfect time to ask for a referral rather than treating it like a total loss.

#### 💡 QUALITY OVER QUANTITY

*Just like any traditional cold outreach, asking for referrals should NEVER be a spray and pray strategy. They work especially well because of the human element involved.*

*Take the time to do your research and be as specific and personalized in your asks as possible. Use the templates in this guide as starting points and evolve from there.*

Some sellers have turned a "not right now" into as many as 4 net new meetings using this exact messaging at the end of a positive discovery call.

#### 👉 STEAL THIS TEMPLATE

*"Totally understand that {company} isn't a great fit for you right now, but since you seem super into the concept, do you know any other {role} that I should be talking to? Always appreciate a good warm intro!"*



## 5 actionable ways for your sellers to get more referrals.

### b. ASK EXISTING CUSTOMERS

After an existing customer has a positive moment (first ROI, shared positive feedback, created a case study, etc), you should absolutely be asking them for referrals. In that positive moment you can remind them how much your product or service has done for them and ask if they know any others who also would benefit.

#### 👉 STEAL THIS TEMPLATE

*"Hey {name}, I know this is a really big ask, so please tell me to kick rocks if you're not comfortable with it.*

*Do you know any other {title} that are dealing with {pain 1}, {pain 2}, {pain 3} that we could help with? Our strongest customers tend to come from people we already know.*

*I'm happy to ghostwrite you a message if that makes it easier. Appreciate it!"*

### c. ASK CUSTOMERS FROM PREVIOUS ROLES

You're likely selling a different product than you were in your last sales role, but that doesn't mean your past closed-won customers might not be able to help.

This tactic is especially helpful in the first 2-3 months after switching jobs, when past customers are likely to still remember you.

#### 👉 STEAL THIS TEMPLATE

*"Hey {name}, I recently joined the team at {company}, where we're doing {one-liner}. Was great working with you when I was still at {old company}.*

*Do you think any {role} at your org might be interested in learning more about the new co I'm at? Appreciate it!"*



## 2. Be specific with warm intro requests

While general, open-ended asks can work really well, you'll likely see more success with referral/intro requests. One of the hardest things with open-ended asks is that you're putting all of the work on the referrer. You're asking them to think through all the hundreds or thousands of people they know to figure out who could be a good fit for you.

If you've already done the research and know that your referrer knows a specific account you're trying to break into, then you can be much more targeted with your ask. This removes extra work for them and increases the chance of a referral happening.

### TIMING IS EVERYTHING

*Asking for a referral, just like cold outbound, is all about timing. Here are some moments when you should be asking for referrals:*

- *After a positive discovery call that isn't moving forward*
- *After a new customer closes*
- *After a customer experiences a positive moment*
- *After a customer shares social proof about your business.*

### STEAL THIS TEMPLATE

*"Hey {name}, saw you're {connected with/used to work with/etc} {name}. They'd likely be a great fit for {company} because {insert reasoning here}.*

*If you have a chance to introduce us, I'd really appreciate it. I've attached a blurb below to make it easy for you to forward to them to see if they'd be interested.*

*Thanks!*

*{1-2 sentences for the referral target}*



### 3. Appreciate and thank referrers

This one may seem painfully obvious, but it's wild how often sellers forget to do this. A happy customer refers you to a new account, and then they never hear from you again. Make sure to keep them in the loop if you want to get more referrals from them in the future!

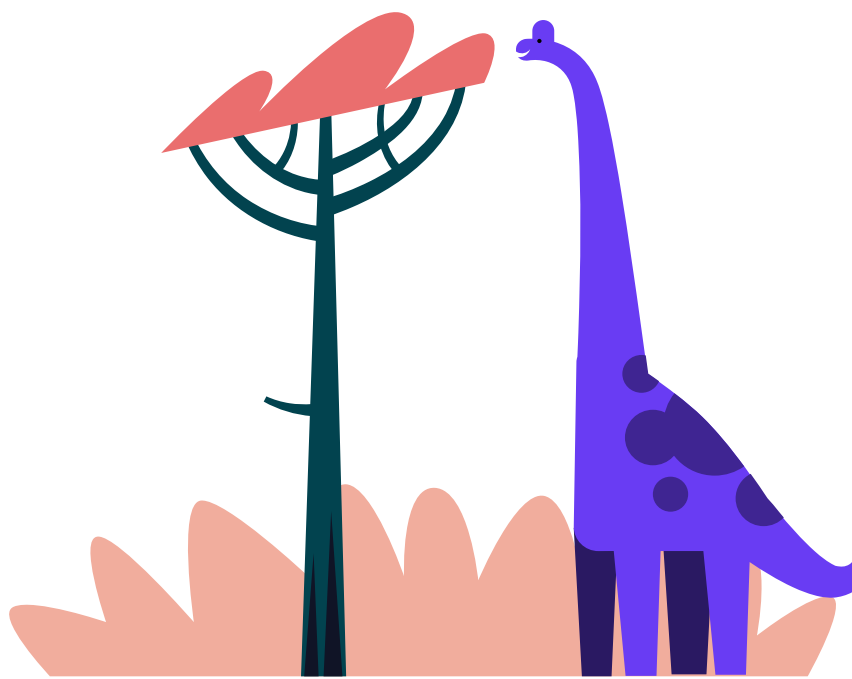
And if that referral turns into a deal, make sure to thank them. Send them a gift, take them out to dinner, send them a handwritten note.

### 4. Leverage your team members networks

The rest of your organization is likely incredibly underutilized for getting referrals and intros into new accounts. There's an easy way to fix that.

Create a Slack (or Teams if you must) channel. Call it something like #network or #gotonetwork and make it a place where any seller on your team can drop in an account they're trying to get in touch with and see if anyone in the company can help.

Maybe they have a friend there, or used to work there. This becomes especially helpful at larger orgs when you simply just don't know who knows who. Bonus points for offering referral incentives for your team. You probably offer them for hiring referrals, so why not customer referrals?



## 5. Create a formal referral program

A formal referral program requires more work than a single seller, but can absolutely be worth implementing if your organization hasn't already. According to INSERT SOURCE - companies with a formal referral program grew 86% faster than those without.


Having a program will help incentivize more customers and partners to make referrals. these incentives can be as simple as earning some cool swag, to a flat \$ fee, or even a percentage of a closed deal's value.

We've seen some companies realize that even with offering a 5-10% referral fee, they're still able to source deals more cheaply with referrals than other sources. The best way to structure your program will depend on your business, what you're selling, and who you're selling to.

### What should you do now?

Send this document to your sellers to make it easy for them to get started. Simply asking for referrals is probably the lowest effort, highest impact activity you can make sure your sellers are doing. Time to put some heat back into your pipeline.

*Still not convinced? Check out this data from Marketo and 4,000 of their customers [5]*



#### CONVERSION RATE BY CHANNEL - LEAD TO OPP

|                   |        |
|-------------------|--------|
| Sales Prospecting | 0.90%  |
| Email             | 0.55%  |
| Inbound           | 3.82%  |
| Paid Marketing    | 2.98%  |
| Event             | 1.48%  |
| Referral          | 10.99% |
| Partner           | 4.54%  |



# Your pipeline is ❄️ cold. Heat it up with your 🔥 network



Ready to go beyond basics and get warm intros in a scalable and trackable way?

Commsor makes it easy to tap into your company's network of employees, partners, investors, advisors and more to find warm paths to prospects, key stakeholders and decision makers.

**You bring your network, Commsor will help you create warmer revenue.**

Learn more at [Commsor.com](https://Commsor.com) →



John Hammond

InGen



Your best intro paths to John:



Alan Grant



Strong



Ian Malcolm



Strong

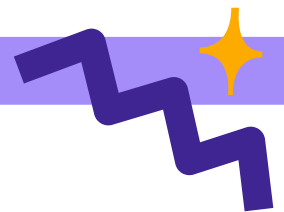


Ellie Sattler



Familiar

+ 12 more



Written by Mac Reddin. Last updated October 2024

## Sources

[1] Dale Carnegie

[2] Harvard Business Review

[3] Wharton School of Business

[4] HBR - Customer Referrals are Contagious

[5] Marketo

[6] IDC - Social Buying Meets Social Selling

[7] Heinz Marketing

