



ways to motivate colleagues to introduce you to their clients

Professionals often feel that their colleagues should be a major source of work opportunities and referrals. It makes commercial sense to blend complementary expertise and seek to offer clients broader support from within the firm.

In reality, however, professionals are often disappointed by the volumes of business leads that originate from within their firm.

A common issue behind this is that individuals are often too focused on their own area of expertise and client work in order to spot opportunities for colleagues. It's easy to get absorbed within your own silo and miss additional ways in which the firm can offer advice and support. It can also then come as a shock when the client turns to a competitor for expertise that could have easily been delivered by others in the firm.

Busy professionals find it hard to remain current and knowledgeable about what their colleagues do and the types of assignments they're working on (and how this could benefit their own clients). In this Winning Business Digest, we give practical tips on how to break down this knowledge gap and ensure your colleagues fully grasp the benefits you bring. We'll also look at how you should handle a cross-selling referral so that more of them flow your way.

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1 Update colleagues on what you do

In seeking cross-selling referrals a good starting point is to assume that your colleagues have little knowledge of what you do. Find ways to spend time with them and share information on what you are doing to help clients, then talk them through some of the recent assignments you've worked on. Think of getting together in a more structured way too. You can widen the benefit by bringing your respective teams together on a regular basis to brainstorm mutually beneficial opportunities. Alternatively just speak for 5-10 minutes at one of their team meetings to give a 'snapshot' of your current work and to stimulate their thinking on which of their clients may need similar help.

Work Winning Action: *Get together with relevant colleagues to update them on what you are doing. Take the approach that they know 50% of what you would like them to know in terms of knowledge of your clients and the current work you are involved with.*

3 Send referrals your colleague's way so they reciprocate

Colleagues are more likely to refer business opportunities to you if you have done the same for them. Think about which of your clients would benefit from a colleague's insight or expertise. Consider those specialising in your client's industry or with specific relevant expertise eg employment, tax, intellectual property etc. Find out more about the cases or projects that your colleague has been working on and discuss ways in which you could introduce their help to specific clients of yours.

Work Winning Action: *If you are struggling to identify opportunities in your own client base for a colleague, look to your wider network of contacts. There may be someone you can introduce them to who, in turn, may have clients or contacts that require your colleague's expertise.*

Inform colleagues of what to look-out for in their client work

2 Educate colleagues on the signs that point to your expertise

Your colleagues will find it easier to recommend you to a client if you can alert them to the client issues and opportunities that point to your expertise. Inform them of what to look-out for in their client work, and discuss natural extensions of their work which link to yours. In the short-term you may find it easier to concentrate on colleagues who have complementary expertise to your own or who specialise in the same industry sector.

Work Winning Action: *Jot down the situations, issues and opportunities that your clients have faced in the last two years which have prompted them to bring you in. Use these to inform your colleagues of the 'triggers' to look out for when they are dealing with their clients.*



Remain current and knowledgeable about what your colleagues do



4 Look for mutual opportunities together

We're seeing more instances of professionals working on opportunities together as this helps them to present a more commercial and attractive offer to clients. Often such professionals work in complementary disciplines and/or specialise in the same industry sector. Another way in which you can join forces with a colleague is to look at organisations' life cycle stages that you tend to be more involved with. It could be that you help more with issues relating to a company's early years and your colleague supports those relating to later growth or even exit. If you focus on private clients, then there may be opportunities for a colleague given the client's wider business interests, family or contacts.

Work Winning Action: *Talk to colleagues where you feel there are mutual opportunities. Identify client meetings you could attend together and networking events where it would be beneficial to 'double up'. Also discuss other promotional opportunities that highlight your combined expertise eg joint articles, guides, seminars or doing a double-act at a conference or other such speaking opportunity.*

5 Earn the right to future referrals

Your colleagues may have an element of trepidation when referring an opportunity to you. Their professional judgment and their client/contact relationship could be undermined if you underperform in any way. The key, of course, is to do an exceptional job that is delivered on time and within budget. You will also reassure your colleague if you can give them relevant and timely progress reports. If they are in the communication 'loop' they will feel more confident in your abilities, and may be able to contribute valuable client insight to ensure you successfully overcome any delivery challenges.

Work Winning Action: *Always thank your colleague and follow up the referral quickly and effectively. Also remember to share any insight you glean which may further enhance your colleague's relationship with this client.*

6 See your internal network as important as your external one

A professional's internal network can hold a significant number of new business opportunities and yet many focus much of their BD effort on contacts outside the firm. Consider how visible you are within your organisation – especially to the colleagues who have potential to refer opportunities to you. Schedule face-to-face time with them, or become more active in firm-wide interest groups, social and other committees that will be valuable to you in raising your profile.

Work Winning Action: *Put together a postcard or one side of A4 overview on a common client issue you are increasingly being called to deal with through your work. Briefly summarise the client's original situation, what the positive outcome was, and how you brought that about through your work. Keep this communication short so that it can be quickly skim-read. Send it to colleagues whose clients may face that same issue.*



WBD: 7 ways to motivate colleagues to introduce you to their clients

7 Demonstrate to your colleagues how well you handle new work referrals

Be sure to let others in the firm know that you handle referrals well and have enhanced the relationship between the client and their main relationship partner. Celebrate and communicate successes, making sure the referring colleague's reputation and credibility is enhanced. If appropriate, explore if this assignment or project can be publicised as a case study for the wider firm to use in marketing and pitch collateral.



Celebrate and communicate successes

Action:

Talk to other colleagues who may have clients in this situation and explain what you did to help. Encourage them to talk to the colleague who referred the opportunity to you, to obtain their feedback on how you handled the situation.

Summary


Having one discussion with a colleague may help improve their knowledge of you in the short-term, but you need to remain on their 'radar' if you want to stimulate referrals over a long period of time. Maintain polite, professional perseverance and subtly keep them informed about the different cases/assignments you've successfully completed. It is best to communicate in the form of examples and case studies to really engage their interest.

Where you can, aim for periodic face-to-face time with them as this will enable them to ask questions, clarify aspects of your work and explore how it may benefit their clients. It also vitally important that you do a good job with any referral you receive. Remember that if you unsettle or damage the client relationship in the eyes of your referrer, their referrals to you will quickly dry up.



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