

The DMI Referral Checklist



Everyone can ask for a referral, but how do you create a **100% referral-based business**? Start by using *The DMI Referral Checklist*...

- Do you have a branded Client satisfaction survey form?
- Do you send out your week 1 branded referral letter?
- Do you send out your week 1 branded reply form?
- Do you send out your Bio and research information, such as your website address, to prospects who can then review your offerings?
- Do you send out your week 2 follow-up reply letter?

Wait 2 weeks...Critical piece! Do not harass you referral providers, but be persistent!

- Week 4 follow-up call with scripted calls to ensure consistency.
- Three follow-up call attempts: 1 day, 3 days, and after 2 weeks.
- If no response, put them on the 6 month Re-Referral Letter list
- Are you asking for three referrals every time?
- Are you conducting comprehensive policy delivery meetings?
- During your policy delivery meetings, do you use a branded customer satisfaction survey form which asks for 3 referrals?
- Do you have a Referral Coach?

If you can not check off 10 items maybe it's time to talk about *The DMI Referral Program* featuring the *DMI Referral Coach* who has built a \$25 Million Dollar, 100% referral-based business practice.





April 9, 2019

Joe Prospect
123 Main Street
Worcester, MA 01606

Dear _____,

This is to confirm our appointment at ____:____AM/PM, on _____ to review the new account that we helped you to place, and its accompanying certificate.

When we first met, one of the promises I made to you was to always provide you the very best service possible. You will find that, at DMI, we take our commitments to you very seriously.

We need your help. In order to provide the ongoing quality service our clients enjoy, we need to ask you to take just a few minutes to complete the enclosed [Client Satisfaction Survey Form](#). Please complete and bring the enclosed survey form with you to our appointment. I'm looking forward to seeing you again.

Regards,

Name Lastname

P.S. I sincerely appreciate the few minutes you give me to complete the survey.

Insurance products and services are offered through [insert company name].



Please help me to continue to provide you and my other clients
the very best service possible by critiquing how I worked for you.

What could we do to change or improve the way that we've worked for you so far?

What did you like best about the way that we've worked for you so far?

In our process of making information available to you, did you ever feel pressured or in any way
uncomfortable with the process?

☐ Yes ☐ No

Once you decided you wanted to speak with me on the phone, did I ever
make you feel pressured to make an appointment, or uncomfortable in any way?

☐ Yes ☐ No

Once you decided you wanted to meet with me, did I ever make you feel rushed or pressured to
make a decision, or did you ever feel I was trying to persuade you?

☐ Yes ☐ No

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As I mentioned when we first met, we are a referral-based firm. Nearly all of our clients come to us by referral from other clients. This is an extremely important reason why we are so different from other firms. We are not solely a transaction firm. We do not just complete a transaction, and then focus on finding our next client.

Because we're a referral-based firm, we don't have to spend our time finding our clients. New clients are referred to us by our existing clients. As a result, we spend our time building true relationships with our clients by providing you the very best information and service possible on an ongoing basis. Our efforts, in this regard, are not just confined to areas that may generate new business between us. Instead, you'll find that we will continuously go the distance to provide significant and meaningful help to you anytime we can.

In return, our clients introduce us to their family, friends, and associates because they know how much they can benefit from the information and help we can provide. Our clients also know that we will always show the same respect and professionalism that we showed them.

Now that you know the kind of help we can provide, and the respect we showed you in providing that help, you can comfortably introduce us to people you care about. The only way they'll ever know about how we may be able to help them is for us to introduce ourselves to them, and give them the opportunity to ask us for information, if they want it. It's Friends Helping Friends.

We always treat your introductions with complete respect. We never just pick up the phone and call them. Instead, we mail them introductory information with a Reply Form. This allows them to let us know whether or not they want any further information, so they know right away that they are in complete control of what, if anything, happens next. We often, in fact, get thank-you notes, even when they are not yet ready for additional information, thanking us for the manner in which we contacted them.

These are the folks we can help the most:

- People who are retired
- People who are close to retirement
- People who have changed jobs and may have had a retirement plan (401k, etc.) with a previous employer

Insurance products and services are offered through [insert company name].



Please allow 3 people you care about the opportunity to benefit from the kind of information I've shared with you, if they want it.

Who do you care about who is retired?

Who do you care about who is close to retiring?

Who do you care about who has changed Jobs and who may have had a 401(k) or other type of retirement savings plan with their previous employer?

Do you belong to any Clubs, Fraternal Organizations, Civic Organizations, or Church-Affiliated Organizations? Names of organizations:

Have you done your Estate Plan?

☐ Yes ☐ No

Which documents are part of your plan?

☐ Will ☐ Power of Attorney ☐ Health Care Proxy ☐ Trust(s)

From:

Insurance products and services are offered through [insert company name].



April 11, 2019

Dear _____,

_____ is/are our client(s), and _____ quite pleased with the help we've been able to provide _____ (over the years). _____ felt that you would appreciate having access to the kind of information and help I've been able to share with _____.

_____ asked me to introduce myself to you, and I promised that I'd send you some introductory information. I do not, however, arbitrarily assume that you will want additional information, so I've enclosed a Reply Form for you to let me know whether or not you'd like to receive more detailed information.

Financially, the last 10 years have been painful for many retirees, or those seriously planning for their retirement, and the next 10 years could be challenging for those who rely on savings that are either at risk, or subject to the uncertainty of fluctuating interest rates. These are unusual times that are different from anything we've experienced in our lifetime, and it's quite possible that the economic volatility will continue.

Financial independence is important to our client these days. We provide them with information and help designed to protect their retirement savings. And for clients that need to take income from their savings, we can offer financial vehicles, such as fixed annuities, that can help ensure that some portion of their savings can **provide the income they need in retirement, with lifetime guarantees**, while keeping access to, and control of, their money.

Enclosed is our "Nest Egg Report" with information that can be quite helpful to you. It also includes several examples of how we've been able to help clients solve issues that are important to them. **Some of these issues may also be important to you.**

You may want to call and ask _____ about the quality and integrity of our services, and the process through which we provide them.

Regards,

Name Lastname

P.S. Please use the enclosed Reply Form and Return Envelope to let us know WHETHER OR NOT you would like to receive additional, more detailed, information.

Insurance products and services are offered through [insert company name].
Annuity guarantees are backed by the financial strength and claims-paying ability of the issuing company.

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Please tell us WHETHER OR NOT you would like more information.

April 10, 2019

Dear _____,

Please check one of the Boxes below, and return this form to us in the enclosed envelope.

- ☐ Yes, I would like to receive additional, more specific information.

The most convenient time for me to be able to spend up to 5 minutes on the phone is at _____ AM/PM. A brief exchange of information will quickly determine what, if any, specific information would be most appropriate for you.

Please call me at the following phone number:

() _____.

- ☐ I do not want additional information at this time, but may want some information at another time.
- ☐ No, I do not want additional information and would like to be removed from your mailing list.

Please provide your e-mail address as an alternate means of communicating:

From:

Insurance products and services are offered through [insert company name].

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