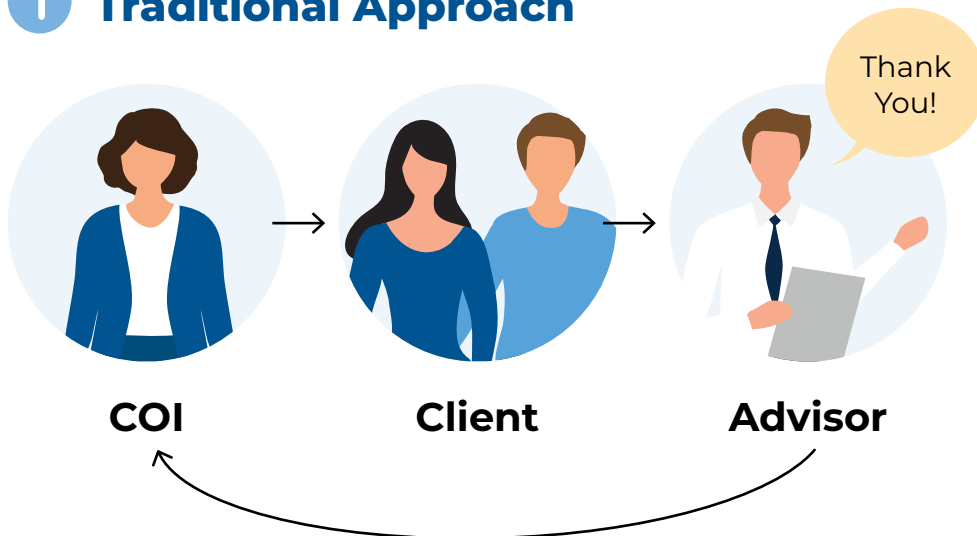


Referral Thank You Process

1 Traditional Approach



2 Adam's Approach



Script Prompt

Asking Client to Write Thank You Note

"Before we wrap up our Blue Sky Session, we have one last thing to do."

"To protect your privacy, I haven't told [NAME], the person who connected us, that we've met or that you're happy and having a good experience here. so one thing I'd like to ask- as long as you're comfortable with it-is if you would help us say "thanks," but we want the "thanks" to come from you and not us."

"Does that sound fair?"

pause for confirmation

"Excellent! I'd love it if I could take a moment to assist you in expressing your thanks so that he knows he made a good introduction."