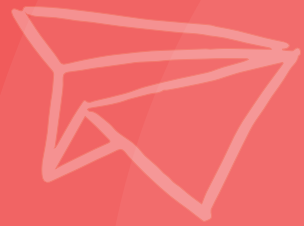


# HOW CAN CLIENT ENGAGEMENT GENERATES REFERRALS

How should we grow our  
advisory business through  
referrals from clients

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A strategy by:  
Dr. Saleem Qureshi  
Chairman  
Assessment Fund



# CLIENTS WHO LOVE YOUR SERVICE WILL REFER YOU TO THEIR NETWORK

Keep your clients continually engaged,  
and be there for them when they need  
you.

Provide your clients the service that is  
being missed by their family office, or by  
their Boards, or by other trusted nodes  
in their network



# "ENGAGED CLIENT" ○

## GIVE MORE REFERRALS THAN

# "SATISFIED CLIENTS"

Getting referrals from clients has a lot to do with psychology.

When you are constantly engaged with a client, you occupy a place on their calendar.

The more engagements you have with your client, the more time you will occupy on their calendar.

Highly engaged clients will tend to refer you to their network.

# CLIENT ENGAGEMENT HIERARCHY THAT LEAD TO REFERRALS





# DON'T PANIC

Just start client  
engagements and  
referrals will follow.