

HOW CAN CLIENT ENGAGEMENT GENERATES REFERRALS

How should we grow our
advisory business through
referrals from clients

A strategy by:

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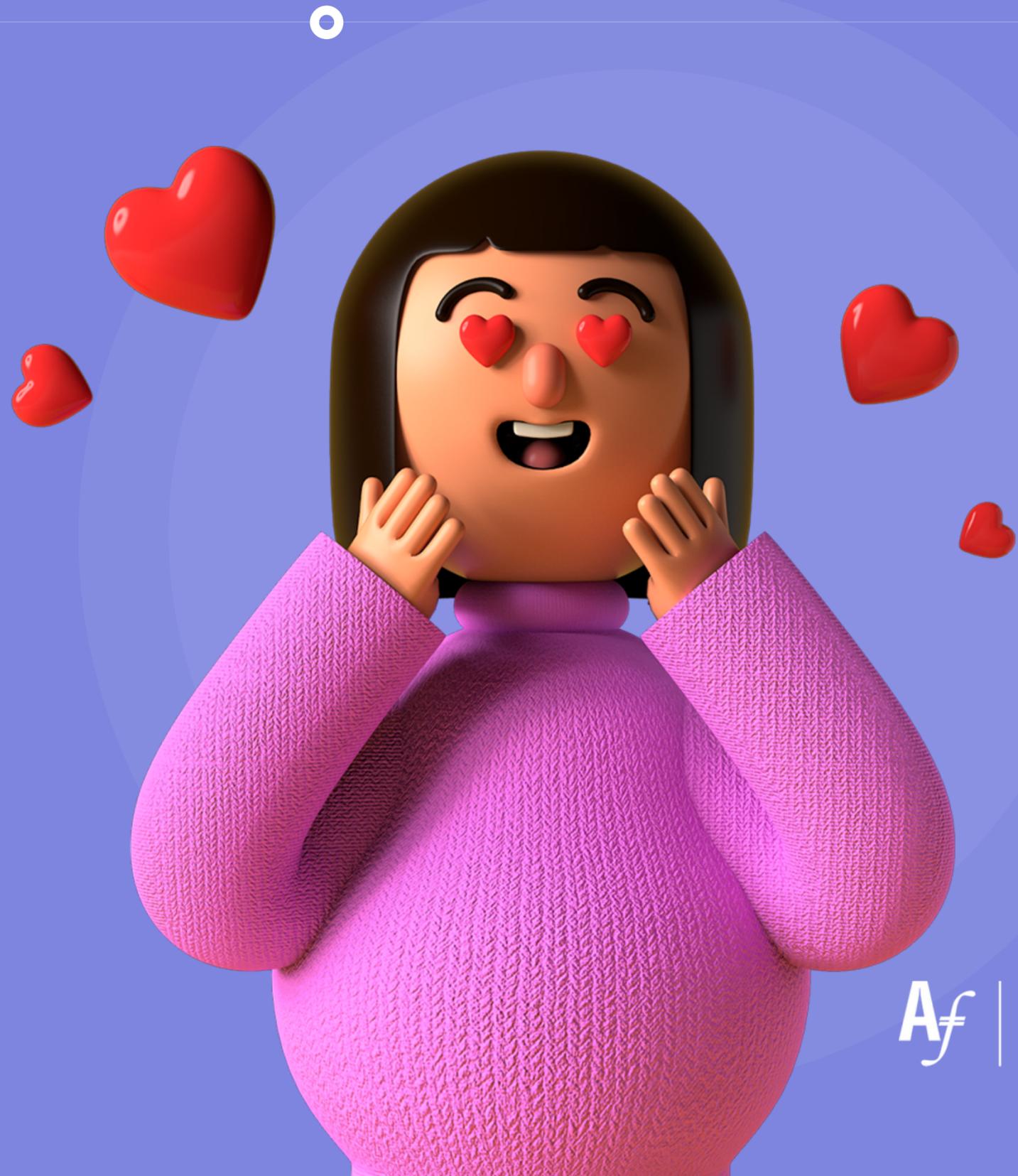
Assessment Fund



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.