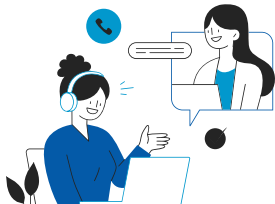


# How to Expand Relationships & DEVELOP NEW OPPORTUNITIES IN NO TIME!

## Tailor & Use "Add On" Questions or Statements

### "BEFORE WE HANG UP" EXAMPLES

1 Before we hang up, I read that a new CFO started a few weeks ago. Do you think I could meet him/her at some point? If so, what do you suggest?



2 Before we hang up, just wanted to ask how the \_\_\_\_ project is going?

3 Before we hang up, I wanted to ask whether your company/firm would be interested in any continuing education topics members of our firm could present at your office for you and your colleagues at a mutually convenient time.

4 Before we hang up, I wanted to ask you a favor please. I saw on LinkedIn that you are connected to X. Would you be willing to introduce me to him/her? If so, I can treat us all to lunch or coffee at your convenience.

### "BY THE WAY" EXAMPLES

1 By the way, I want to thank you for mentioning my name to others you know who may need or are looking for X advice or services.



2 By the way, thank you for referring [NAME] to me, I very much appreciate you mentioning my name to others who may need X services/advice.

3 By the way, please keep in mind that if you learn or hear of anyone you know who needs X feel free to give them my name.

4 By the way, I saw on LinkedIn that a new CTO has started at your company. Is there a time I could meet him/her?

### "NOT DOING MY JOB IF I DID NOT ASK/SAY" EXAMPLES

1 I would not be doing my job if I did not ask about your/raise the issue of your company's X. Since the company has faced [FILL IN BLANK] lawsuits this year, it may be a good use of time for us to discuss and review [COMPANY'S] X program sometime soon.

2 I would not be doing my job if I did not let you know that my firm offers a full range of services. Because you work in wealth management, it would likely be beneficial for you to meet my partner [NAME]. Would you like me to set up a meeting?

### "FROM TIME TO TIME" EXAMPLES

1 From time to time, I like to take a step back with my existing clients like you and ask: \_\_\_\_\_.

2 From time to time, I like to remind all my existing referral sources like you that not only can you refer \_\_\_\_\_ matter/work/cases to me, but you can also consider referring \_\_\_\_\_ also. We do not and will not try to poach or steal your clients.

**MUST WORK TO MAKE ADD-ON ASK A HABIT & NEED TO FOLLOW-UP IN WRITING!**