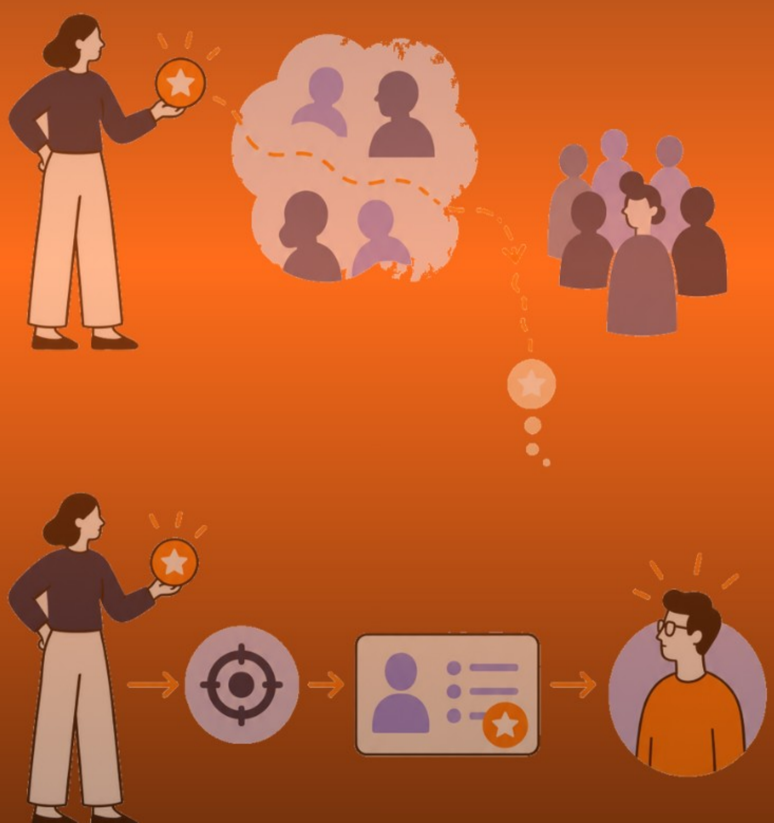
THE DECISION SEQUENCE

MARKETING BUILT AROUND HOW PEOPLE DECIDE

A vague referral transfers nothing

How to give and get a referral



Why a generic introduction transfers none of the trust that earned it

THEDECISIONSEQUENCE.COM

A J. WORDEN COMPANY · JWORDEN.COM

How to ask for a referral

Why generic introductions don't transfer the trust that was earned

Gates. Relevance: secondary. **Credibility: primary.** Proof: secondary. Safety: secondary. Access: no.

A referral works by transferring credibility, and a vague introduction transfers none of it. Name the situation that should trigger the introduction, and hand the client the words.

What a client says on the firm's behalf is the whole product. Somebody has to write it.

The symptom

Last day of a good engagement. Everybody's pleased, the invoice is clean, and somewhere near the door comes the ask: let me know if you hear of anyone who could use us.

They say yes. Warmly. They mean it. And then...nothing.

Or something arrives months later and it's worse than nothing. Two lines of email, you two should talk, and a prospect who shows up knowing only that a person you both know thinks well of you. The conversation starts at the beginning. Same discovery, same credentials, same proof of capability any stranger off a search engine would need.

Which the firm files as a referral anyway. It came from a client. It counted.

Why it keeps happening

The generic ask survives because it's comfortable for both sides, and comfort is a durable design principle.

It asks the client for nothing. No specific person, no specific moment, no commitment past agreeable intent. And it gives them nothing to work with, which is the half that gets missed. A client who genuinely wants to help has been handed no way to do it.

It also protects the firm. Naming what the firm wants feels presumptuous right after a client has paid the invoice and said they're happy, so the request gets softened until there's nothing left in it to be embarrassed about. The vaguer it is, the smaller the risk of looking like you're trading on goodwill you just earned. That instinct is decent, and it costs the firm most of its referral volume.

I've made the comfortable ask. Got the warm yes, walked out feeling like the relationship was in good shape, and counted it as a referral program.

The failure is invisible, which is why it persists. A generic ask produces silence rather than bad referrals anybody could learn from, and silence gets read as market conditions.

What the buyer is doing at the Credibility gate

Two people are moving through this gate, and the one everybody forgets is the referrer.

The client making the introduction is lending their own standing to somebody who trusts them. If it goes badly, the damage reaches past the firm and lands on the judgment of the person who made the call. They're accepting exposure for no return beyond feeling useful.

A generic ask asks them to accept that exposure with no way to manage it. Who's the right person? What do I say? What if I describe the work wrong and promise something these people don't do? Most human beings resolve that question by doing nothing, politely.

The prospect on the other end is doing the borrowing. Someone they trust has already made a partial judgment, so they arrive with part of the Credibility work finished, which is why referred prospects move faster and convert differently than the ones who arrive cold. The borrowing depends on content. *You should talk to these guys* transfers a relationship. *They fixed the exact thing you described to me in March* transfers a judgment.

The correction

Replace the generic ask with a specific one on two axes, then take the drafting work off the client's desk.

Name the situation the client will recognize. Manufacturers over fifty million is a filter nobody can run in conversation. When you hear somebody describe this particular problem is a recognition cue, and recognition is something people do without effort. Pick the two or three situations that reliably precede a good engagement and describe them the way a client would hear them described over lunch.

Ask them to vouch on a dimension. A general endorsement produces general language, which produces nothing. Ask what they'd say about how the firm handled the hard part of their own engagement. The difficult conversation. The week it stalled. The decision they were dreading before anybody arrived. That's the piece a stranger can't get anywhere else.

Then hand them the language, written, short enough to paste into an email. The enablement set runs nine items, none complicated: a short firm description, who the firm helps, when to introduce the firm, the common trigger situations, approved introduction language, two or three short email templates, a one-page overview, the relevant proof points, and a process simple enough to explain in one sentence.

The standard governing all of it is that a third party has to be able to use the material without understanding the methodology. If the introduction language requires the client to have absorbed how the firm works, somebody has written training material and called it enablement.

Name the timing too, because timing beats wording. The ask lands best right after a moment the client has just described as going well. The annual review is months too late, and the renewal conversation reads as pressure. The Tuesday they mention the board presentation went fine, that's the moment. Which means somebody has to be paying attention rather than waiting for a calendar entry.

Before and after

Before. *Thanks again, this was a great project. Let me know if you hear of anyone who could use us.*

After. *One favor. If you hear someone describe the problem you had in March, where nobody could agree what the numbers meant, that's the situation we're best at. I've written two sentences you can paste into an email, including the part about how we handled the week the whole thing stalled. Two minutes, and I won't ask you to chase it afterward.*

What backfires

Handing a client language they'd never say out loud. Approved copy written in the firm's marketing voice is worse than no copy, because now the client chooses between sounding like a brochure and drafting it themselves, and they'll choose neither. Write it in their register and let them edit it.

The other one is asking for the introduction and then going quiet about what happened. A referrer who lent standing and heard nothing back won't lend it a second time.

Run this on your own material

Call a client who's happy and ask them to describe what your firm does. Don't help. Don't correct them. Write down what they say, word for word if possible.

Then read it as a stranger would. Does that description make you curious? Does it tell you when to think of these people? Most of the time it's a category and a compliment, which is what the referral program has been sending into the market on the firm's behalf.

The gap between what they said and what a stranger would need is your enablement brief. The words they reached for on their own are the ones that work. Everything missing is the part you have to supply.

Signals you've cleared it

Advance when referred prospects arrive already knowing which problem the firm solves, and the first conversation opens somewhere past discovery. When a client forwards your language instead of rewriting it. When introductions come attached to a situation, she's dealing with the thing you fixed for us, rather than a category.

Hold when the referrals are warm and generic. The relationship is fine and the language isn't, and asking again more warmly won't change it. Hold when clients keep saying yes and nothing ever arrives. Hold when your best client can't describe the work in a sentence a stranger would follow.

Where this connects

Story from the Field · *The Man Who Understood the Customer.* Value given freely, and what it buys.

Research Library · Entry 08, authority and social proof.

Next move · Go to *How to measure whether trust is building*.