

SDR REFERRAL WORKSHOP

BUILDING A REFERRAL DRIVEN MINDSET



Of all the potential lead sources for your company, it's hard to argue that anything is preferred by your team than a positive referral.

Your marketing team can provide the clearest content expressing the values of your solution, and your sales team can smooth talk their way to equate those values in relation to a customer's pain points, but getting started with your foot in the door and establishing trust is always the hardest part of the sales process.

Referrals are simply the easiest, most cost-effective and powerful method of getting in front of potential buyers.

Like most good things in life though, they don't typically come easy. Knowing how, where and when to ask for referrals is an art form that requires planning, practice, execution and support to be effective.

Through a customized referral workshop, Tenbound can help guide your team to develop these skills and integrate them into your sales discussions.

If your team isn't asking for referrals, it's a safe bet that you aren't getting very many of them. Let us help change that by instilling a referral driven mindset in your team, and you'll be able to see the benefits to morale, pipeline and closed deals from these referred opportunities in no time.

TYPICAL WORKSHOP AGENDA ITEMS

What are referrals and are they important?

- Case studies of successful programs

Various types of referrals, and when/where each is appropriate

- When it's appropriate to pay the referrer, and methods for managing expectations
- Referrals vs. sales channels

How to request a referral?

- When is it or isn't it appropriate
- Methods of working requests into conversations

Referral strategies by situation / relationship

- Asking for a referral from a happy, established customer is a much different task than asking from a lost opportunity or unqualified lead. One strategy/approach to every situation is setting yourself up for failure.
- Define your ideal referral profiles, and varied approaches for each one
- Create and practice referral pitches for both verbal and written situations
- How to keep referrals moving, and how to follow up with and thank your referrer



tenbound.com
(415) 944-7872



About Tenbound

Tenbound is 100% focused on Sales Development. We help start or improve your Sales Development program through events, training and consulting programs.

More meetings, more sales. Tenbound

Operationalizing your referral program

- How to track, coach and reward
- Communicating success to other teams
- Setting goals for teams and individuals
- CRM/Workflow integration

Tools and solutions for referrals

- Overview of selected solutions and how they can help (or hinder) your program
- LinkedIn, Bravado, G2crowd, Trustradius, etc.

HOW TO GET STARTED AND HOW TENBOUND CAN HELP?

Let's schedule some time to discuss your current situation and referral shortcomings,

and come up with a customized workshop agenda to kick start a program for your team.

We work most efficiently on-site where we can dive deep with relevant team members as needed, but also happy to consult remotely if preferred.

Our team is capable of guiding you to success through developing a referral playbook for you and your team to execute, and also available to get our hands dirty alongside your team putting it into action. We can help build out your reporting, metrics and dashboards accordingly, and help build training and content to get other teams involved and onboard as needed.



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