



The Ultimate Referral Swipe File

5 In-Person Referral Requests

1. The Casual Coffee Chat Approach

"You know, [Client's Name], I've absolutely loved working with you and seeing the transformation you've made. It's been amazing to watch. Given the success we've had together, do you know anyone else who might be facing similar challenges and could benefit from this work?"

2. The Success Story Reinforcement

"Remember when we first started and you were feeling [mention challenge - e.g., stuck, invisible, uncertain]? And now look at you - [key success/result]! Seriously, I've loved watching your transformation. If you know someone in your network who's feeling like you did back then, I'd be honoured to help them too. Could we make that intro happen?"

3. The Direct Ask with an Offer to Help

"Hey [Client's Name], I know the work we've done together has been a game-changer for you. And I want to help more brilliant people like you. If there's someone in your network who could benefit, would you be open to introducing us? I can even send you a quick email script to make it super easy—no pressure at all, just putting it out there!"

4. The Mid-Project Ask (70% Through the Work)

"We're about 70% of the way through our work together, and I love the progress you're making. It's exciting to see how far you've come! I know there are others out there who could benefit from this too. If anyone comes to mind, I'd love to meet them - do you think you'd be able to make an introduction?"

5. The Friendly Follow-Up at a Networking Event

"I was thinking about our work together and the great progress you've made. I know you're well connected, and I'm always looking to help more people like you. If you ever come across someone who needs what we do, I'd love it if you pointed them my way!"

5 Email Referral Request Templates

1. The Success & Introduction Email

Subject: Quick Favor - A Simple Introduction

Hi [Client's Name],

I just wanted to take a moment to say how much I've loved working with you. Watching you go from [starting challenge] to [current success] has been inspiring.

I'm always looking to help more incredible business owners like you, so I wanted to ask—do you know someone who might be feeling the same struggles you once had? If someone comes to mind, I'd love an intro. I can even send a short email template to make it super easy.

No pressure, of course—just wanted to put it out there. Thanks for considering!

[Your Name]

2. The Mid-Project Referral Ask (70% Through the Work)

Subject: Exciting Progress - And a Quick Ask

Hi [Client's Name],

I can't believe how far we've come since we started working together! Seeing [specific progress or milestone] has been so rewarding, and I'm thrilled with the results you're getting.

I wanted to reach out because I know there are others out there who might be facing similar challenges. If you know someone who could benefit from what we do, I'd love the opportunity to help them too.

If someone comes to mind, let me know - I'd be happy to draft a quick intro email to make it easy!

Looking forward to catching up soon.

Thanks

[Your Name]

3. The Friendly & Low-Pressure Ask

Subject: Know Someone Who Could Use This?

Hi [Client's Name],

I hope you're doing great! I was thinking about the work we've done together and how much progress you've made. I know you have a great network, so I wanted to ask - do you know anyone else who might benefit from the same kind of support?

If someone comes to mind, no rush, but I'd love an introduction. Let me know, and I'd be happy to send a short note to make it as easy as possible.

Thanks so much!

[Your Name]

4. The Gratitude + Referral Follow-Up

Subject: A Quick Thank You + A Thought

Hi [Client's Name],

I just wanted to take a moment to say thank you! Working with you has been fantastic, and I love seeing the impact our work is having.

I was wondering - if you ever come across someone facing [specific challenge], would you be open to introducing us? I'd love to help them the way I've helped you.

No pressure at all, and thank you again for being such an amazing client!

[Your Name]

5. The Update & Referral Nudge

Subject: *Quick Update + A Thought*

Hi [Client's Name],

I just wanted to give you a quick update - I reached out to [referred person's name], but I haven't heard back yet. I thought you'd want to know, just in case you wanted to follow up.

No worries if they're busy, but I really appreciate the introduction and just wanted to keep you in the loop!

Thanks again for your support - it really means a lot.

[Your Name]