

Referral Request Templates

Specific, low-friction language to ask for the right introduction — without sounding desperate or vague. The more specific you make it, the better it works.

BEFORE YOU SEND

Why most referral asks fail

- **Be specific, not broad.** "Know anyone who needs me?" gets a blank stare. "Know a contractor drowning in receipts?" triggers a name.
- **Make it effortless.** Do the work for them — even write the intro itself.
- **Earn it first.** The best asks go to people you've already given to.

TEMPLATE 1

The specific ask email

EMAIL · TO A CONTACT OR REFERRAL PARTNER

SUBJECT: A quick favor — one specific introduction

Hi **[Name]**,

Hope things are going well **[at their company / since we last talked]**.

I'm reaching out with one specific ask. I'm looking to connect with **[a very specific person — role, industry, situation]**, because **[the problem you help them solve]**.

You came to mind because **[reason]**. Is there one person like that you'd feel comfortable introducing me to?

No pressure at all if no one comes to mind. And if I can return the favor and connect you with anyone, just say the word.

Thanks **[Name]**,
[Your name]

Why it works: One specific person, a reason they were chosen, an easy out, and reciprocity offered — confident, never needy.

TEMPLATE 2

Asking a happy client

Referral Request Templates

EMAIL · RIGHT AFTER A WIN

SUBJECT: So glad that worked out — a quick ask

Hi **[Name]**,

It's been great working with you, and I'm thrilled **[specific result you achieved together]**.

A quick ask: most of my best clients come from introductions, and people like you — **[type of client]** who value **[what they value]** — tend to know others in the same boat.

Is there one person you know who's dealing with **[the problem you solve]**? If someone comes to mind, I'd be grateful for an introduction — and I'll take great care of them, just like I have with you.

Either way, thank you for trusting me with **[the work]**.
[Your name]

Why it works: Timed to a fresh win, anchored to a client type, asks for one person, and reassures them their referral will be cared for.

TEMPLATE 3

Reciprocal referral exchange

Referral Request Templates

MESSAGE · TO A CONTACT-SPHERE PARTNER

SUBJECT: Sending business each other's way?

Hi **[Name]**,

We both work with **[shared ideal client]**, and I think we're a natural fit to refer to each other — you handle **[their service]**, I handle **[yours]**, no overlap.

Here's who's perfect for me: **[your ideal referral in one line]**. Tell me who's perfect for you, and I'll keep an eye out.

Want to grab 20 minutes to trade a few names and figure out how we can help each other's clients?

[Your name]

Why it works: Names the shared client, makes the non-compete explicit, leads by giving your ideal first, and proposes a concrete next step.

TEMPLATE 4

"Who do you know who..." prompts

CONVERSATION PROMPTS · PICK AND ADAPT

"Who do you know who just **[started a business / bought a home / got promoted]**?"

"Who do you know who's frustrated with **[the common pain you solve]**?"

"Who do you know who recently **[sold a company / changed jobs / retired]**?"

"Who's the first person who comes to mind when I say **[your one-line target]**?"

"If you were me, who's the one person in your network you'd want to meet?"

Why it works: A closed, specific question searches the brain far better than an open one.

TEMPLATE 5

Warm intro (for your champion to forward)

Referral Request Templates

EMAIL · WRITTEN FOR YOUR CHAMPION TO SEND

SUBJECT: Intro: **[Your name]** & **[Prospect name]**

Hi **[Prospect]**,

I wanted to connect you with **[Your name]** of **[Your business]**. They help **[who you help]** with **[what you do]**, and I thought of you because **[the specific reason this prospect would benefit]**.

[Your name] **[credibility line]**. I'll let you two take it from here.

[Your name], meet **[Prospect]** — **[one line on who the prospect is]**.

Best,

[Champion]

Why it works: Your champion spends zero effort, the prospect gets a warm reason, and you control the framing. Always offer to write it.

The honest version

No template rescues a one-sided relationship. The people who say yes to your ask are the ones you've already shown up for. Give first, be specific, make it easy — and the referral feels like a favor between friends, not a cold request from someone keeping score.