

THE WARM INTRODUCTIONS PLAYBOOK

How To Generate More High-Quality Referrals With Less Effort



A proven system to turn your best clients into a steady source of warm introductions—
12x more effective than traditional referrals.



+



LEGACY



Why Traditional Referrals Fail & The Power of Warm Introductions

The Problem with Traditional Referrals

- Most advisors rely on referrals, but they're unpredictable, awkward to ask for, and often bring in the wrong kinds of clients.
- A warm introduction solves this issue—by leveraging trust transfer, advisors can generate 12x better results vs traditional referrals, consistently and at scale.

What's Holding Advisors Back?

- Todd Fithian has been teaching this process for years, and many firms have seen massive success using it to generate predictable, high-quality introductions.
- But the biggest challenge isn't the process—it's launching the NPS campaign.
- For some firms, it takes 3–6 months just to get started. **For others, it never gets off the ground.**

The Snappy Kraken + Legacy Solution

- That's why Snappy Kraken and Legacy partnered to solve the #1 roadblock advisors face: implementation.
- Our brand-new **Client NPS Score and Referral Campaign** is fully automated and done-for-you.
- Now, firms can launch this process instantly—without months of setup and tech headaches.

What is an NPS Score?

Net Promoter Score (NPS) is a simple way to measure client satisfaction and loyalty. Clients are asked a single question: 'On a scale of 0–10, how likely are you to recommend our firm to a friend or colleague?' Based on their responses, clients are categorized into three groups:

Promoters (9–10): Loyal clients who are highly likely to refer others.

Passives (7–8): Satisfied clients, but not enthusiastic enough to actively refer.

Detractors (0–6): Unhappy clients who may need further engagement before becoming advocates.



The Step-by-Step Process to Generate Warm Introductions

STEP 1 Identify Your Promoters Using NPS

- Send an NPS survey to your clients, asking: “On a scale of 0–10, how likely are you to recommend our firm to a friend or colleague?”
- Score Interpretation & Next Steps:
 - Promoters (9–10):** Ideal candidates for warm introductions. Respond promptly to schedule a conversation.
 - Passives (7–8):** Satisfied but not actively promoting—follow up to gather feedback and improve engagement.
 - Detractors (1–6):** At risk—reach out to repair the relationship before making any introduction requests.

TIME-SAVING TIP

This entire step is automated for you inside Snappy Kraken.

- ✔ The entire NPS Score campaign is pre-built and fully automated—all you have to do is click *launch*.
- ✔ Automated emails and texts guide clients through the NPS process, increasing response rates and helping identify more promoter clients.
- ✔ Advisors receive real-time alerts whenever a client submits an NPS score, with guidance on how to respond.

STEP 2 Set Up Warm Introduction Meetings with Promoters

- **Why This Works:** Instead of awkwardly asking for referrals, invite promoters to a conversation about people in their network who could benefit from your services.
- **Sample Talk Track for Calling Promoters (Score 9-10):** “Thank you so much for your excellent rating. We’re thrilled to hear that you’re satisfied with our services. As you may know, one of the biggest challenges in my business is finding great people like you that I can do my best work with. Based on your response, I wanted to ask if you’d be open to spending some time identifying people in your network who might benefit from the work we’ve done together.”
- **If They Say Yes:** Schedule a Dedicated Introduction Meeting (DIM) to identify and connect with ideal introductions.
- **If They Say No:** “I completely understand. If at any point you feel comfortable revisiting this and come across someone who might benefit from my services, I’d be more than happy to discuss it.”



STEP 3 Conduct the Dedicated Introduction Meeting (DIM)

Meeting Structure:

1. Express gratitude for their feedback and support.
2. Reinforce your ideal client profile—who you serve best.
3. Help them think of people in their network who match your ideal client.
4. Set expectations: Advisors and clients should both come to the meeting with a list of potential introductions.
5. Make the introduction process easy:
 - Offer a sample email they can forward.
 - Provide multiple ways to introduce you (email, LinkedIn, a casual mention, etc.).

STEP 4 Follow Up & Track Results

Key Insight: The best firms don't just collect NPS scores—they *act on them*.

Handling Passives (Score 7-8):

- Call and ask for feedback: *“Thank you for your feedback. I appreciate you taking the time to share your thoughts. I’m curious—what could we do to improve your experience?”*
- Some clients in this group convert to promoters just by having this conversation.

Handling Detractors (Score 0-6):

- Send a follow-up email: *“We’re sorry that your experience hasn’t met your expectations. Your feedback is important to us, and we’re committed to addressing your concerns. Could you please share more about what specifically led to your dissatisfaction?”*
- The goal here isn't to ask for an introduction—it's to recover and strengthen the relationship.



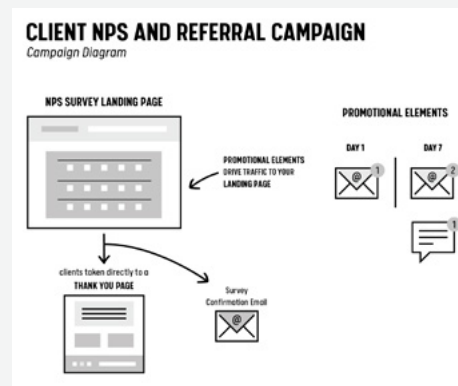
How Snappy Kraken Automates the Process for You

Your Biggest Barrier to Success is Implementation—Here’s the Solution

- Legacy has successfully taught this system for years, helping many advisors generate consistent warm introductions. However, the biggest challenge firms face is implementing and executing the NPS campaign that helps you identify promoter clients.
- The Snappy Kraken Client NPS and Referral Campaign automates this entire process, making it easy to:
 - ✔ Launch the done-for-you NPS Score campaign.
 - ✔ Let automated emails and texts collect responses and identify promoter clients.
 - ✔ Advisors receive real-time alerts whenever a clients submits an NPS score, helping them take immediate action on warm introductions.

Next Steps

Already a Snappy Kraken client? Head to your campaign library and search for “*Client NPS and Referral Campaign*” to identify your active promoter clients and start generating warm introductions.



If not, [schedule your demo today](#) to see how it works—and explore how Snappy Kraken gives you access to a full suite of marketing automation tools designed to help you attract, nurture, and convert more clients with less effort.