

# Referral Scripts:

When it comes to referring a client to Cake, our partners have found these 3 approaches (listed below) to be the most successful timing for a handoff. Feel free to utilize the following scripts for whichever stage of the customer cycle works best for you and your clients.

## Scenario #1 (Most Popular)

**The client officially transacted with your business - its time to hand them over to Cake**

Thanking the customer for their business: *At this point you're all set!* (Partner to fill in here with any follow up details if/when they will be reaching out to the customer again to confirm when the date gets closer, or provide any additional details). *As an added thank you for working with us, we will have our utilities concierge partner, Cake, reach out to you. You should receive a text message from them within the next few days. Their team specializes in the available utilities and service packages for your area, so they can help you find the best rates on everything for your new home (Internet/TV, electricity, home security...whatever you need!) They'll even get it setup and activated for you - it's super easy and convenient! Their services won't cost you anything to use - we offer it as a perk for our customers. We hope it helps make your transition a bit easier! Thanks again for allowing us to serve you, and please feel free to reach out if there's anything else we can do for you.*

## Scenario #2

### **The client is in process - refer to Cake prior to officially transacting with your business**

After giving the customer a quote/estimate, and awaiting a decision: *If you need any further information to help you make a decision, feel free to reach out and we'll be happy to help. In the meantime, I'm going to have our concierge partner, Cake, reach out to you. They help all of our customers find the best rates on Internet, Electricity, Home Security and more. Whatever you need to get set up in your new home! Once you select the services you want, they'll actually get it activated for you, so you don't have to worry about setting it all up yourself. Cake is 100% free for you to use - just as a thank you for considering us. Whether you go with us or not, they'll be reaching out to you via text. If you'd like to utilize their free service, all you'll need to do is respond via text. Super easy! We hope this helps make your transition a little smoother. Thanks again for thinking of us, and we look forward to the opportunity to serve you!*

## Scenario #3

### **The client declined to work with your business, however could still refer to Cake in the hopes to achieve commission**

After the customer chooses to decline: *Thank you for letting us know, we completely understand that you need to do what works best for you. We are grateful to have been considered to help you with your \_\_\_ needs. As a thank you, we will have our concierge partner, Cake, reach out to you. Their team specializes in helping you find the best rates on Internet, Electricity, Renters Insurance and more. They will even get your services activated for you, so you don't have to call and set everything up on your own. We typically only provide this free service to our customers, but we really appreciate you thinking of us, so we'll have them reach out to you in the next few days. Should you choose to utilize their free service, all you will need to do is respond back to them via text message. Pretty easy! We hope you will keep us in mind for the future, and if there ever is anything we can do to help you, please don't hesitate to reach out. Wishing you the best of luck on your move!*