

Sales Systems / Appointment Setting

Scripts for asking existing customers or contacts for introductions to new prospects, with specific referral language.

Difficulty: Intermediate

Model: GPT-4 / Claude / Gemini

Use Case: Referral Selling, Introductions, Network Leverage

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Why This Prompt Exists

Most salespeople don't ask for referrals — or ask poorly (“Do you know anyone else who might be interested?”).

You get:

- vague referral requests (no specific ask)
- no context for the referral (hard for them to help)
- low-quality introductions (wrong people)
- missed opportunities to leverage happy customers
- cold outreach when warm intros are available

But referrals are not random.

They are strategic requests with specific criteria.

- Timing: ask when they're happy (after a win, milestone, positive feedback)
- Specific criteria: “Do you know any VPs of Sales at B2B SaaS companies?”
- Make it easy: provide email template they can forward
- Reciprocity: offer value in return (referral bonus, discount, case study feature)

Without referral scripts, you leave your best source of leads untapped.

This framework forces AI to create referral request scripts that get warm introductions.

The Prompt

Assume the role of a referral selling coach who turns customers into advocates.

Your task is to create referral appointment request scripts.

Generate:

1. REFERRAL REQUEST (timing: after a win)
 - Acknowledge their success
 - Ask for specific type of referral
 - Make it easy (offer to draft email)
 - Script (word-for-word)

2. REFERRAL REQUEST (timing: during quarterly review)
 - Review their success metrics
 - Ask for referrals to similar companies
 - Script (word-for-word)

3. REFERRAL REQUEST (email template they can forward)
 - Draft email they send to their contact
 - Introduces you and your value
 - Asks for a 15-minute meeting

4. REFERRAL TRACKING & THANK YOU
 - How to track who referred whom

- Thank you message (after meeting, after deal)

5. REFERRAL INCENTIVE (optional)

- Discount, gift card, donation, or case study feature
- How to present without feeling transactional

INPUTS:

Your Product/Service:

[DESCRIBE]

Ideal Referral Profile (specific criteria):

[E.G., "VP of Sales at B2B SaaS companies with 50-500 employees"]

Your Best Customer (success story):

[DESCRIBE THEIR RESULTS]

Referral Incentive Available:

[YES (DESCRIBE) / NO]

Relationship with Customer:

[LONG-TERM / NEW / MIXED]

RULES:

- Ask for referrals when they're happiest (after a win, positive feedback)
- Be specific about who you want to meet (not "anyone")
- Make it easy (offer to draft the email)
- Acknowledge and thank them for every referral

- Track referral source in CRM
- Reciprocate value (incentive, recognition, introduction)

How To Use It

- Ask for referrals when customers are happiest (after a win, positive feedback).
- Be specific about who you want to meet (not “anyone” but “VPs of Sales at B2B SaaS companies”).
- Make it easy — offer to draft the email they can forward.
- Thank them for every referral (even if it doesn’t close).
- Track referral source in CRM to measure effectiveness.

Example Input

Your Product/Service: CRM automation software for sales teams

Ideal Referral Profile: VP of Sales at B2B SaaS companies with 50-500 employees

Your Best Customer: Saved 4 hours/week per rep, grew team from 10 to 20 reps without adding admin headcount

Referral Incentive Available: YES (\$500 Amazon gift card for any referral that becomes a customer)

Relationship with Customer: LONG-TERM (2+ years, multiple upsells)

Why It Works

Most salespeople don’t ask for referrals effectively.

This framework improves outcomes by forcing:

- strategic timing (when they’re happiest)
- specific referral criteria (quality over quantity)

- easy forwarding (remove friction)
- acknowledgment and tracking (accountability)
- reciprocity (incentives, recognition)

Great referral requests don't leave it to chance — they make it easy for happy customers to help.

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