

# Boca Consultants Referral Information

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## Description

This document answers the following questions:

What should I listen for,  
What should I look for,  
What conversation starters should I use,

that will tell me it's time to get Boca Consultants involved?

And suggests responses to introduce a referral.

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## What to listen for

- We are doing well and would like to do even better.
  - We are ready to grow but aren't sure how.
  - This problem just keeps coming back and we can't get rid of it.
  - We are rolling out a new product/service and want to make sure it goes well.
  - We have some managers we want to develop.
  - We are opening a new location and want to make sure things go well.
  - We have no plan and it's holding us back.
  - We have a plan but we don't stick to it.
  - We don't know our butt from our elbow.
  - I just can't figure this out.
  - Who do you know that can help us?
  - We just can't hire the right people.
  - We can't keep the right people.
  - We are always hiring and/or firing.
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## What to look for

- Declining sales in a rising industry or economy.
  - Growing pains (cramped office space, sharing phones or desks).
  - Chickens running around without their heads.
  - A lot of product returns.
  - Growing number of customer complaints.
  - A lot of Work In Process (WIP) inventory.
  - A lot of finished goods inventory.
  - Low morale.
  - High employee turnover.
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## Conversation Starters

- How do you plan to get more successful?
  - How do you develop your staff?
  - What are the biggest concerns you face?
  - What process do you use to find the cause of problems?
  - What process do you use to prevent problems?
  - What process do you use to make decisions?
  - What process do you use to prioritize?
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## What you can say in response

I hear that a lot these days. When I do, I suggest they talk with one of my colleagues. May I have John Schneyer call you? Here is his card.

I have a friend who can help. He does a lot of work like this. Let me have John Schneyer call you. Here is his card.

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