

Notice. Ask. Introduce. Then we take it from there.

Making an introduction takes about ninety seconds. You never explain how it works, quote a number, or chase a document.

1. **Notice the moment.** A high bill, insurance going up, a wish to lower monthly costs, rates too high to refinance. Or a past client you haven't talked to in a while.
2. **Ask permission.** One sentence, then stop talking. Never introduce someone who hasn't said yes.
3. **Start a group text** with your client and our team on one thread. A real introduction, not a phone number for them to call.

> "Would it be okay if I introduced you to the team I use for this? They'll look at your actual usage and tell you straight whether it makes sense for your house. No pressure either way."

The permission question

> "Meet Peter and Mike from The Sun Broker, the team I mentioned. They came from real estate and mortgage like me, and they'll take great care of you."

The group text, once they say yes

What happens next

1. **We reply on your thread** and find a time that works for your client.
2. **A 15-minute Discovery Call.** We learn the home before we recommend anything.
3. **A written proposal** built on their real usage, next to their current bill.
4. **You hear from us at every step,** including when the answer is no.

What to avoid

- **Quoting savings.** Any number you say becomes your promise.
- **Asking for the electric bill.** It's a chore, and that's where referrals stall.
- **Explaining how it works.** Hand it off. That's our job.
- **Deciding for them.** "Their bill is probably fine" is a guess. Ask.

Let the introduction tool write it for you

Pick your role and the moment. It writes the message and opens your own texts or email with our team already on it. Once you sign up, your personal link credits every introduction to you.

sunbroker-introduce.netlify.app

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