



GUIDELINES FOR MONTHLY REFERRAL MEETING

1. Target one guest/partner per month. Invite a minimum of 3-4 weeks in advance of desired date.
2. Inform guest/partner of purpose of the meeting.
3. Prepare "Referral Guide", company brochure and any other information that would be helpful to referrer in advance of meeting.
4. If guest/partner is willing to tour your office/facility, give a tour of reasonable length. Thank them for coming in and review company services, history and capabilities in private room covering areas not described in the tour.
5. Include a lunch invitation if possible. A thank you note should be sent the same or next day.
6. If a face to face meeting results in a referral, or subsequent referral, be certain to send a small, creative thank you gift and note. Consider creating a formal referral thank you process at your company.
7. As the relationship progresses with the "referee", keep the referrer up to date on the outcome of your work on an appropriate basis.
8. If you have a company newsletter, or any type of regular mailing, event, or opportunity to contact the referrer make sure referrer is on the mailing/contact list. Maintain at least semi-annual contact with the referrer for the specific purpose of talking about new referrals, thanking them for old referrals and just for staying in touch.
9. Reciprocate referrals as appropriate whenever possible.