



## REFERRAL PLANNING & STRATEGIES ACTION STEPS

**Objective:** To implement an effective method of obtaining quality referrals via a planned process.

**Method:** The steps to creating and implementing a referral-selling plan are:

1. Set written goals/expectations for your plan.
2. Create a “referral guide”, minimum of one page.
3. Create a potential referral list i.e.:  
Satisfied clients, banker, attorney, accountant, advertising agency, community and non-profit contacts, fellow board members, community leaders
4. Develop a consistent system for contacting, writing, meeting referring and following up with list of contacts.
5. Implement and monitor and adjust your process.

**Suggestions:**

- Write a handwritten note to someone you know asking them for an appointment with someone they know whom you would like to meet
- Invite your attorney, accountant, banker, etc. to your office for a tour, review of your services and capabilities and lunch. Give them a copy of your referral guide - assure them that you will reciprocate whenever/wherever possible
- Hold a “sales” seminar in conjunction with another professional firm and give valuable information or training
- Take your top five client contacts (one on one) to lunch and explain your sales responsibilities, desire to grow and ask for their help if they are willing-ask for at least one specific name or contact they can give you and ask if you can use their name
- Reward everyone that gives you a referral that results in a face to face meeting with at least a thank you note and possibly some small, creative gift
- Start with a list of 12 people and have a goal of obtaining 1 referral per month for 12 months from each one of the 12