



## Referral Strategy/Process

1. Create an appropriate referral incentive program. Commit it to writing in a presentable fashion.
2. Build the referral strategy into your sales process – ie: plan during the follow up (service after the sale) call when the client/customer is likely to feel/experience their “highest” level of satisfaction having chosen your product or service.
3. Develop a system of integration – making it easy to remember and leveraging the client’s likely “path of least resistance” in following through with referrals.
4. Script the process of requesting referrals to lead the client to be honestly interested and willing in the process of offering qualified referrals. Be sure to explain how you’ll administer the referral process (the steps below) with the client – to show the ease of the process and thus increase the likelihood of success. In other words, tell them what you are going to do, then do it.
5. Create a goal for the number of referrals you expect to receive from a client – 3, 5, 10 – keep it palatable for them and manageable for your follow through.
6. Create a pie chart dividing categories of relationships to help the client carve out an effective list of names – categories may include church, sports activities, gym members, family, neighbors, co-workers, past job co-workers, school or academic association, other.
7. Instruct the client to identify people (that “look” like themselves within these categories), list them and offer their contact info (email is best).
8. Explain that you’ll send the client an email that he/she can send to the people they are interested in referring – do it then if you can to be sure it happens. Ask them to CC you when they send the emails.
9. Once you receive the CC, be sure to contact the referral accordingly.
10. Lastly, be sure to update the client who made the referral about your progress and thank them. Also, honor any referral incentives you’ve offered in a timely fashion