

Referral plan.

Many advisory firms want more referrals, but few have a plan to get them. Use this worksheet to outline your referral strategy and tactics to keep it front of mind. Share your referral system with you team, track and monitor process.

WHY	Strategic activities & desired outcomes	Activities: <input type="checkbox"/> Referral sources identified <input type="checkbox"/> Referral seeds planted weekly	Outcomes: _____ Ideal client referrals _____ % Referrals become clients
	Desired or targeted referees <i>Identify names or target segments</i>	<input type="checkbox"/> Clients: _____ <input type="checkbox"/> Professional centers of influence (COIs): _____	
WHO	Articulate Target ideal client(s): _____		
WHAT	Referral seed language: _____		
HOW	GAME PLAN TO ATTRACT		PROCESS TO MANAGE
	Clients: <input type="checkbox"/> Plant referral seeds with identified referrers <input type="checkbox"/> Express willingness to grow <input type="checkbox"/> Add value-driver & referral seed to agenda <input type="checkbox"/> Share client stories <input type="checkbox"/> Event call-to-action <input type="checkbox"/> Create shareable moments <input type="checkbox"/> Other	Team: <input type="checkbox"/> Role Play/Train on referral seed <input type="checkbox"/> Train on ideal client <input type="checkbox"/> Incentivise <input type="checkbox"/> Other COIs: <input type="checkbox"/> Meet (<i>circle one</i>) monthly, quarterly, bi-annually, annually, ad-hoc <input type="checkbox"/> Collaborate on key clients <input type="checkbox"/> Other	How we track referrals in CRM: <input type="checkbox"/> Referrer tags/identifiers <input type="checkbox"/> Track lead source as referral <input type="checkbox"/> Track referrals as opportunities <input type="checkbox"/> Other
			How we follow-up with referrals: <input type="checkbox"/> Joint email <input type="checkbox"/> Phone call <input type="checkbox"/> Multiple follow-ups over two weeks <input type="checkbox"/> Add to newsletter list <input type="checkbox"/> Other
			How we keep referrers in the loop and thank them: <input type="checkbox"/> Formal thank you letter and/or gift <input type="checkbox"/> Communicate regularly with status updates <input type="checkbox"/> Other
How our digital footprint with seed language that reinforces referrals: <input type="checkbox"/> Website/social media <input type="checkbox"/> Referral scheduling link <input type="checkbox"/> Regular communications (e.g. newsletter) <input type="checkbox"/> Other		How we develop and nurture referrers/advocates: <input type="checkbox"/> Appreciation event(s) <input type="checkbox"/> Gift(s) <input type="checkbox"/> Other	

Important information.

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