

Referability Scorecard.

NAME:

DATE:

How referable are you? Based on advisor-research we've determined there are key tactics that the most referable firms do better than their peers. Anywhere you answer "no" there's room for improvement. Use the linked resources on the right to help you address any areas holding you back.

	YES	NO	IF "NO"...
Is your business driven by processes, including having a plan to get and convert referrals?			Being process-driven is the #1 referability habit > Build your referral plan > What does our research teach us about being process driven?
Do you specialize in an ideal client or technical area?			Develop an ideal client persona toolkit
Do you talk about your ideal clients, their needs, and the unique value you can provide with your staff, centers of influence (COIs), and clients?			Build strong value messaging using best practices Design your referral seed
Are you getting referrals from COIs?			COI referral lessons from the 2022 study
Do you tell clients and COIs how you prefer to be introduced?			The most effective ways to connect with referrals
Do you close 75% or more of referrals received?			Conversion best practices from the most referable firms
Do you have a strong digital footprint (e.g. website, SEO, etc.)?			Search yourself, what comes up? Ensure your website, social profiles, and SEO speak to your strengths and make it easy to connect
Are you happy with the amount and type of referral you are getting?			Be intentional with getting referrals using our 2022 advisor referral study key takeaways



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