

Referral Plan.

NAME:

DATE:

Many advisory firms want more referrals, but few have a plan to get them. Outline your referral strategy and tactics, keep [SEI's research-based best practices](#) front of mind, and share your referral system with your team. Track and monitor process so you know if it works.

WHY	Strategic activities & desired outcomes	Activities: ☐ Referral sources identified ☐ #___ Referral seeds planted weekly	Outcomes: _____ Ideal client referrals _____ % Referrals become clients
	Desired or targeted referees <i>Identify names or target segments</i>	☐ Clients: ☐ Professional centers of influence (COIs):	
WHO	Articulate Target ideal client(s):		
WHAT	Referral seed (Design your referral seed here):		

	GAMEPLAN TO ATTRACT	PROCESS TO MANAGE
HOW	Clients: ☐ Plant referral seeds with identified referrers ☐ Express willingness to grow ☐ Add value-driver & referral seed to agenda ☐ Share client stories ☐ Event call-to-action ☐ Create shareable moments ☐ Other	Team: ☐ Role Play/Train on referral seed ☐ Train on ideal client ☐ Incentivize ☐ Other COIs: ☐ Meet (<i>circle one</i>) Monthly, Quarterly, Annually, Other _____ ☐ Collaborate on key clients ☐ Other
	How our digital footprint (website, social, marketing/SEO) supports/reinforces referrals: ☐ Referral seed language on website/social ☐ Use referral language in communications (<i>e.g. annual mailer</i>) ☐ Referral scheduling link ☐ Other	How we track referrals in CRM: ☐ Referrer tags/identifiers ☐ Track lead source as referral ☐ Track referrals as opportunities ☐ Other How we follow-up with referrals: ☐ Joint email “we’ll take it from here” ☐ Phone call ☐ 3-4 follow-ups over 2 weeks ☐ Add to newsletter ☐ Other How we keep referrers in the loop and thank them: ☐ ‘Thank you for the referral’ ☐ Ongoing status updates with referral client ☐ Other How we develop & nurture referrers/advocates: ☐ Appreciation event(s) ☐ Gift(s) ☐ Other

