

Asking For and Receiving Referrals Checklists

Asking For Referrals

1. When I am with a client that I want referrals from, I ask for referrals 100% of the time.
2. Everyone in my network knows the services I offer, and the Benefits.
3. I tell my Alliance group who to refer to me once a week.
4. I refer people to my Networking groups and my clients weekly.
5. I have completed the WWWW on each client/company I want to be referred to.
6. I have a script that includes the WWWW to ask for the referrals I want.
7. I counter the "I can't think of anyone now" comment with specific triggers of memory.
8. Asking for referrals is as important as any other step in my agenda with my clients.
9. I tell my new clients that I will be asking for referrals from the first appointment.
10. I get to the affirmative(stating their benefits) before asking for referrals.
11. My expectation is to receive quality referrals from every client.
12. I have a sheet in my agenda for client meetings to record referrals.
13. I file the sheet on the referral in my client's file so I can update him/her on the referral.
14. My clients usually call or contact the person to let them know I will be calling.
15. My clients/centers of influence know how I call and contact the people they refer.
16. I call/contact the person referred to me within 5 working days.
17. I send a thank you note/e-mail or call to thank anyone who refers someone to me.
18. Everyone in my office knows the steps to make this system flow.

Receiving Referrals

1. My clients/Networking groups know I receive referrals professionally and personally.
2. Every referral is valued and goes immediately into the system.
3. I add new referrals to my yellow card system/data base as soon as I return to the office.
4. I keep my clients/centers of influence up to date on the status of the people they refer.
5. I connect and find a common interest with the person referred quickly.
6. I return all calls timely.
7. I have empty file folders and plenty of room for new clients.
8. I contact the referred lead by letter before I call.
9. I have a marketing assistant that contacts a % of people referred to me.
10. I make sure people who are referred to me and want to stay on my mailing list-DO.
11. Receiving referrals is just as important in our office as asking for them.
12. I send a gift/flowers/lottery ticket when a referral becomes a client.
13. I get 95% of my new business from referrals.
14. I stay on my client's priority list by sending him/her referrals.
15. I repay my clients when the benefits my company provides exceeds their expectations.