

authentic networker



relationship marketing
BLUEPRINT

module six
refer



REFER

In this module, you will:

- Discover the advantages of referrals as a lead source
- Identify the best times to ask for a referral
- Develop effective language to ask for referrals
- Assess the referrability of your business
- Decide which elements of a referral program you want to use
- Brainstorm potential referral partnerships within your network
- Ask questions to decide whether and how to move ahead with new referral partnerships

Lesson 1: Why Referrals?

Watch the Module 6, Lesson 1 video and use this worksheet to fill in the blanks and take notes.

Referral Marketing Statistics



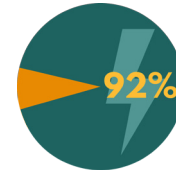
Referral marketing generates 3 to 5 times higher

_____ than any other channel.



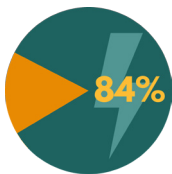
Referred customers are 4 times more likely to

_____ to your brand.



92% of consumers

_____ from people they know.



84% of B2B decision makers

_____ with a referral.



Customers referred by other customers have a 37% higher

_____.

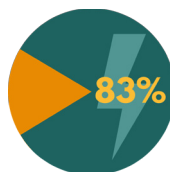


Customer acquisitions through referrals

_____ 200% more than the average customer.

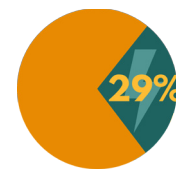


_____ of a referred customer is 25% higher than that of other customers.



83% of consumers are

_____ after a positive experience...



And yet, only 29%

_____.

Referrals come from...

target

Like attracts like. Your ideal clients, now acting as connectors, make excellent matchmakers!

storify

Your ability to communicate what you do and the value you offer to your ideal clients.

pitch

The time you invest growing your network, extending your reach, and building rapport.

network

The value you add to your business relationships and the service you provide to your existing clients.

follow up

Lesson 2: How Referable is Your Business?

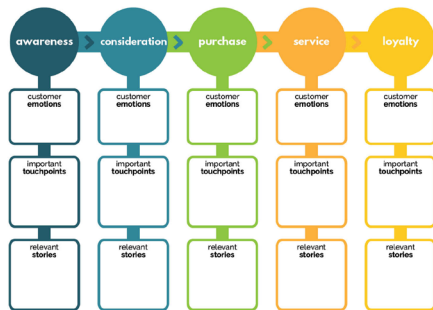
Take this quiz to see whether you're ready to generate referrals!

	points:	0	1	2	3
Do I provide exceptional service that keeps my customers happy?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> often	<input type="checkbox"/> always
Do my clients have a clear benefit as a result of working with me?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> often	<input type="checkbox"/> always
How easy is it for my clients to share referrals: do I give them materials, templates, or a sharing link?		<input type="checkbox"/> none	<input type="checkbox"/> one	<input type="checkbox"/> some	<input type="checkbox"/> all
Do I maintain a web and social media presence?		<input type="checkbox"/> none	<input type="checkbox"/> rarely	<input type="checkbox"/> often	<input type="checkbox"/> always
Do I offer referral incentives?		<input type="checkbox"/> no	<input type="checkbox"/> unadvertised	<input type="checkbox"/> 1-sided	<input type="checkbox"/> 2-sided
Do I minimize reputational risk for my clients by following through on commitments?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> often	<input type="checkbox"/> always
Do I ask referred customers to refer others?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> often	<input type="checkbox"/> always
Do I ask customers to refer more than once?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> often	<input type="checkbox"/> always
Do I maintain client relationships after the sale?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> often	<input type="checkbox"/> always
Do I put testimonials & reviews to work for me?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> sometimes	<input type="checkbox"/> often
Do I have a referral program, referral networking group or referral partnership in place?		<input type="checkbox"/> none	<input type="checkbox"/> one	<input type="checkbox"/> two	<input type="checkbox"/> all
Do I regularly give referrals to others?		<input type="checkbox"/> no	<input type="checkbox"/> rarely	<input type="checkbox"/> sometimes	<input type="checkbox"/> often

Tally Your Score: **0-12 points: Referral novice.** Time to create a fresh referral program.
12-24 points: Referral trainee. Make a few tweaks for referrals to fly.
24-36 points: Referral master. Keep it up & watch your business grow!

Lesson 3: When and How to Ask for Referrals

Your Customer Experience Map



Recall the Customer Experience Map you developed in Module 2, Lesson 2.

Return to that exercise now and consider your client's emotional journey working with you.

What are their biggest wins? When do they perceive the greatest value working with you? Identify their positive emotional points: the best times to ask for referrals in your business.

Based on your customer experience map, what are your clients' biggest wins?

When do your customers perceive the greatest value working with you?

Which additional positive emotional points do they experience?

When are the best times for you to ask for referrals?

What to Say When You Ask for Referrals

When you ask for referrals:

- _____ about who you want to meet;
- Ask for an _____;
- Express _____;
- _____ on the referral;
- Treat the referral like a _____;
- Close the _____ loop.

Referral Question Examples:

Who do you know **who has the same struggles you did?**

Who in your *(office/family/industry)* **besides yourself** would like to learn more about *(value you offer)*...?

Who do you **like?**

Do you know any other people who are *(your ideal client description)* who need help with *(the problem you can solve)*?

Would you be comfortable introducing us?

I love working with people like you, who are *(desirable characteristic)*, especially people who have *(challenge)*. If you were in my position, **what would you do to find more clients like you?**

Write your own ideal referral question here.

Referral Request Letter Example

This is very similar to the testimonial request letter in Module 2.

But who should you send it to?

Ask your customers this question: "How likely is it that you would recommend our company/product/service?" If they answer 9 or 10 out of 10, they are likely to refer to you. Send them a version of this letter! Customize it to fit your business.

Dear *[name]*,

We want to thank you for giving us the opportunity to work with you. We sincerely hope you have enjoyed our *[products/services]* and that you are on your way to reaching *[client goal]* with our help.

As you know, our mission is to continue to help more people like you. Our hope is to reach more people with the work we do and help them achieve their goals. One of the best ways for us to grow is through referrals from our best clients.

Who do you like, who has the same struggles you did? *[or... Can you think of anyone who would appreciate receiving the same benefits you did?]* We would love to help them achieve similar results if there might be a fit. Would you consider referring them to us?

You can send us an email introduction at *[email address]*. If you need help explaining what we do, here's a link to more information *[include link or print materials with this letter... customize this part to fit your business]*.

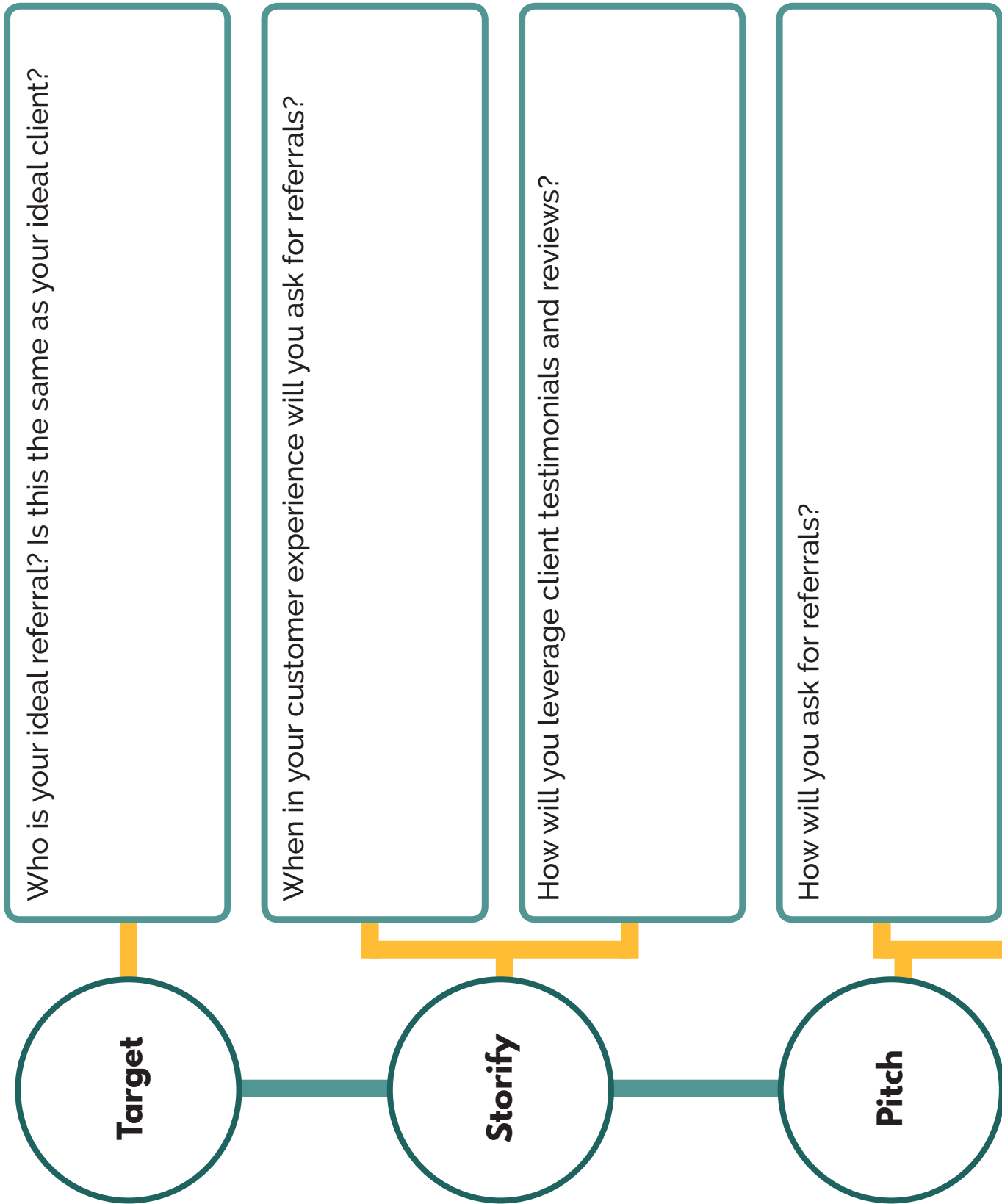
We appreciate your help growing our impact!

With gratitude,

You

Lesson 4: Plan Your Referral Program

Use this planning sheet to create a new referral program or refine an existing one.



What referral materials or script will you give your clients?

How will your referral add value: what incentives will you use?

How will you make it easy for people to share with their networks?

How will you follow up with referrals & keep connectors informed?

Network

Follow Up

Lesson 5: Referral Partnerships

Put a formal referral strategy in place and watch your business grow.

Three ways to formalize referrals:

A referral partner is somebody whose business _____ yours, and who markets to a similar _____, but who does not _____ with you.

4 Referral Partnership Considerations

Think _____. Focus on developing a strong relationship.

Consider whether you have access to each other's _____.

Consider this person's level of _____.

Expect to _____.

Potential Referral Partners

Answer these questions with names of existing contacts, or businesses you'd like to know but don't know yet. If you see the same name come up more than once, it's a good sign that person or business is worth talking to about a potential referral partnership.

Who serves the same ideal client demographic as you?

Contact:

- 1.
- 2.
- 3.

Whose clients spend money on related products/services?

Contact:

- 1.
- 2.
- 3.

Which businesses or individuals share your mindset?

Contact:

- 1.
- 2.
- 3.

My Business

Who has content or knowledge that complements yours?

Contact:

- 1.
- 2.
- 3.

Who would you absolutely love to pass referrals to?

Contact:

- 1.
- 2.
- 3.

Who are the influencers in your industry or region?

Contact:

- 1.
- 2.
- 3.

Referral Partner Interview Questions

The process of vetting potential referral partners takes time, but is very worthwhile. Learn more about each other's businesses, and decide whether a referral partnership is a good fit. Remember: you don't need to explain every last detail. Keep it simple enough for the other person to remember your answers and share them with others.

Business Model

1. Give an overview of your full value proposition.
Walk through your process, and how you deliver value to your customers.
2. What makes you different from your competition?
How does this difference benefit your clients?

Ideal Clients

1. What does an ideal client look like for your business? How will I recognize a good fit?
2. How do you want to be introduced to referrals? Email, phone, social media?
3. Are our ideal clients similar? Do we have access to each other's ideal client?

Promotion Strategies

1. How do you currently market your business? How well is it working?
2. What events or promotions are coming up for your business?
3. What opportunities do we have to collaborate or promote each other?
4. What information or testimonials can I share with someone who wants to learn more?
5. Does this referral partnership make sense, and feel like a fit?
If so: how do we want to move forward? Do we need to meet again or learn more?