

Create A REFERRAL PLAN that Works



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In early 2017, we sent out an informal survey and asked some of our associates, clients, colleagues, and friends about what they focus on in business. The results revealed interesting trends about how and where people find clients, what they believed their strengths and challenges were, and where they would like to be spending their time.

One area that was abundantly clear was where respondents find clients – **93% of them rely on referrals** and **61% regularly attend networking events**. Thanks to the lightning speed of social media and the countless options to automate sales and marketing processes, it makes sense that referrals and relationship-building would be key strategies in growing any organization of any size.

But, what we often see when working with our own clients is that developing and implementing an *actionable plan* to secure referrals



is a challenge. Often asking for referrals or recommendations is an afterthought (if it's a thought at all). Business owners are more focused on securing new business and don't pay attention to the low-hanging fruit of their already raving fans.

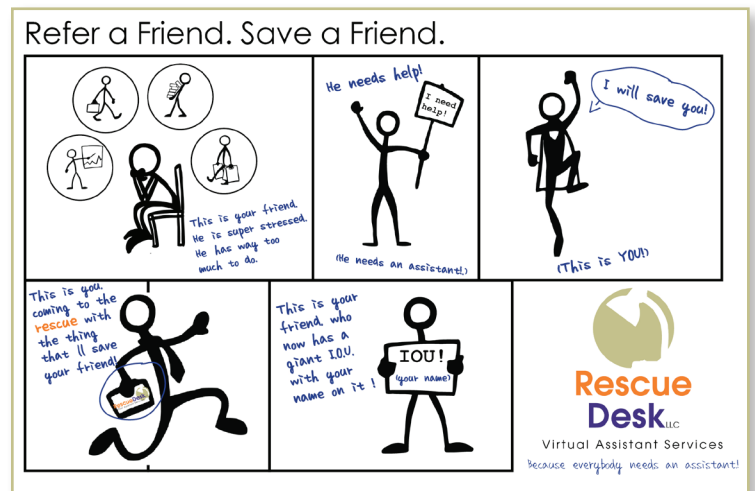
But, like most things in business, you can utilize tools and implement systems to ask for (and track) referrals and recommendations and embed them into your marketing and sales strategies.

1. Build a Referral Toolbox

Educate and equip people to talk about your business. Provide the tools to easily rave about you. Nothing is worse than missing an opportunity because you're caught flat-footed when someone unexpectedly tells you how awesome you are. Create a toolbox so you're always ready.

Create scripts and taglines that hone your message and are easily repeatable. You can create scripts to use with your current clients, when you're communicating with your associates, or as part of your outbound communications (think signature lines, or at the bottom of email campaigns, or on specific pages of your Website.)

Develop materials that are specifically designed to make it easy for people to talk about you. This can be content that's easy to send to a friend, tools that can be easily shared, or creative marketing pieces that specifically focus on the "how" of sending you referrals.



Embed formal referral strategies into your overall marketing. We all have marketing plans that include email campaigns, social media, direct mail, networking events and advertising. Ideally, our marketing plans are driven by actionable, mapped-out plans that are tied to calendars, tasks, processes and procedures. Include specific strategies to request referrals as part of your plan.

Don't forget to thank your referral sources. We've seen too many people forget to "close the loop" when they get a referral. A little bit of appreciation goes a long way, and thanking people for sending you business can easily be put into a process. If you don't have a formal "referral program" (more on this later), use your CRM system or embed it as part of your weekly administrative task list to properly thank anyone who sent you referrals the previous week.



2. Create a checklist to identify ideal referral partners

A lot of us get “accidental” referrals. We do a great job for a client or have a great meeting with a prospect then, out of the blue, we’re recommended to one of their associates. That’s great, but consider how much more impactful it would be if you did it *on purpose*. By knowing what customers you want to attract, you have the power to be more intentional in getting recommendations that will allow you to showcase your product or service to ideal clientele.

Look outside your current client base for referral sources. It’s likely you’ve developed relationships with people who may not be a great fit for your services, but are still easily considered friends and fans of your company. Perhaps it’s another vendor who provides complementary services – accountants and bankers, consultants and lawyers, Web developers and copywriters... just to name a few.

Determine the criteria for ideal referral sources. Not everyone is an ideal referral source, nor do you want them to be. Develop criteria and checklists describing a good referral source. And don’t be afraid to get personal. Go beyond the demographics of industry, company size, customers served; include things like personality traits, work styles, or anything else that’s important in honoring your company’s culture and values.



Look to complementary industries or businesses who also serve your customer base.

3. Test and Measure Referrals

If you invested time and effort in creating a formalized system to embed referral marketing into your strategy, you should be able to test and measure your efforts.

Establish metrics that you want to track. The first obvious metric is to keep track of how many



referrals you get. But, the second (and just as critical) step is to have a goal to measure your efforts *against*. Dive deeper into your data in order to make more impactful decisions about your referral strategies. You could track things like how many referrals are converted into clients, what those clients are worth in revenue, how often content is shared or forwarded from email campaigns, or how many “asks” it takes to secure a recommendation on social media.

A formal referral program is also an option. But, the same rules apply about testing and measuring your efforts. A formal referral program could provide rewards for referrals, which can be a powerful incentive – discounted services, gift cards, or even cold hard cash. But, a formal referral program incurs costs to the business in time, money, and resources. In order to make sure you’re getting an ROI on your investment, test and measure results.

4. Testimonials and Recommendations

In some cases, it just isn’t possible to get a formal, personalized introduction to a potential new customer. Instead, make it easy for people to provide general testimonials and recommendations that can be used on social media, on your Website, and as part of your general marketing.

Ask specific questions, especially if you’re looking for a more in-depth testimonial from your clients. Keep the questions open-ended, but specific. Instead of asking “What did you think about your experience with us?” ask “How much time did this new process save your business?” or “How would you rate our company’s knowledge on this particular tool?”

Be honest about how you’ll use their testimonial, and get permission. And be honest about why you’re asking for a recommendation, explaining how much of your business comes through word-of-mouth marketing.

Make it easy by sharing links to review sites (Yelp, Facebook, LinkedIn), and embed them as part of the last steps of a project or after a product has been sold.

5. Make it part of your current client lifecycle

If you do nothing else, do *not* forget to ask for referrals, testimonials or recommendations from your current clients. If a customer is happy with your work, there are few reasons they wouldn’t put in a good word for you.

Know when to ask. It’s probably not the best idea to ask for a referral or recommendation as you’re



handing over the bill; it's much smarter to pair it with a positive client outcome. Make sure you're asking specific questions about how your product or service specifically made their lives better.

Provide something unique that's easily shareable by your clients. A recent article on Inc.com laid this out very succinctly in an example: *"You don't ask her for a favor. You DO her a favor. You create something very valuable that SHE can give to her friends and associates, and they will be delighted to get it. And this something is limited and unique and only available to her associates because of her relationship with you."*

A final thought

None of this will help unless you're committed to *being referable* in the first place. Be authentic, strive for excellence in your own work, and be self-aware. If you're doing mediocre work for mediocre clients, or your customers must deal with your high-maintenance work style, or you have a reputation for beating vendors into submission, there's no reason for anyone to send their colleagues and friends to you.

At the end of the day, it's always more important to give than receive. If you're pounding the pavement looking for referrals, you're wasting your time if you are stingy about referring others who provide value to you and your business. Spread the love, and we all win.

About Us | *Rescue Desk was founded in 2008 with one goal in mind: to build a virtual assistance firm that works behind the scenes helping small-business owners succeed. We are an executive assistant, marketing coordinator and project manager all rolled into one, and we take time-consuming support tasks and projects off your to-do list. Anyone who has ever said "I need an assistant!" can utilize the services of our firm. We are a partner whose job it is to give you the time you need to grow your business and find that work/life balance we all work so hard to achieve. Learn more at www.RescueDeskVA.com*

