

Referral plan.

Many advisory firms want more referrals but few have a plan to get them. Use this worksheet to outline your referral strategy and tactics to keep it front of mind. Share your referral system with you team, track and monitor process.

WHY	Strategic activities and desired outcomes		Activities: Referral sources identified Referral seeds planted weekly	Outcomes: # Ideal of client referrals % Referrals who become clients
WHO	Desired or targeted referrers: <i>Identify names or target segments</i>		Clients: Professional centres of influence (COIs):	
WHAT	Articulate target ideal client(s): Referral seed language:			
HOW	GAMEPLAN TO ATTRACT		PROCESS TO MANAGE	
	Clients: Plant referral seeds with identified referrers Express willingness to grow Add value-driver and 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, Bi-annually, Annually, Ad hoc Collaborate on key clients Other	How we track referrals in CRM: Referrer tags/identifiers Track lead source as referral Track referrals as opportunities Other	
	Enhance digital footprint with seed language that reinforces referrals: Website/social media Regular communications (e.g. newsletter) Referral scheduling link Other		How we follow-up with referrals: Joint email Phone call Multiple follow-ups over two weeks Add to newsletter list Other	
		How we keep referrers in the loop and thank them: Formal thank you letter and/or gift Communicate regularly with status updates Other		
		How we develop and nurture referrers/advocates: Appreciation event(s) Gift(s) Other		