

STEP 1: REFERRAL TOOLKIT

Referability scorecard.

How referable are you? We believe that there are key tactics that the most referable firms do better than their peers. Check "yes" where you believe you have a good process in place. If you answer "no", there's likely room for improvement.

	YES	NO	IF "NO"...
Is your business driven by processes including having a plan to get and convert referrals?			Be process-driven and form a referability habit.
Do you specialize in an ideal client or technical area?			Develop an ideal client persona toolkit.
Do you talk about your ideal clients, their needs, and the unique value you can provide with your staff, centres of influence (COIs), and clients?			Build strong value messaging for your practice, and design your referral seed.
Are you getting referrals from COIs?			Consider enhancing your existing partnerships or identifying new professionals from your network.
Do you tell clients and COIs how you prefer to be introduced?			Define the most effective ways to connect with referrals.
Do you typically close 75% or more of referrals received? 50%?			Utilize conversion best practices from the most referable firms (e.g. study groups, industry conferences).
Do you have a strong digital footprint (e.g. website, social media)?			Google your name and practice. What comes up? Ensure your website and social profiles speak to your strengths and make it easy to connect.
Are you happy with the amount and type of referrals you are getting?			Improve your referability with our referability toolkit.



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