REFERRAL BEST PRACTICES

ACTIVATE YOUR NETWORKS

OUTREACH + EDUCATION

Define and Prioritize Your List of Contacts that have a High Potential for Referring You

- Create a process that reminds you to regularly reach out to these referral-worthy contacts.
- Consider using your marketing automation system to keep your contacts engaged.
- Provide these advocates with value-add content to aid in their success. The more successful they are, the more valuable their referrals are.

Educate Your Referral Sources

- Educate your contacts on the type of referrals that interest you. Research suggests the most fruitful approach is to help a client spot a good referral opportunity. When they understand the need or the problem you're solving that is more likely to trigger a referral.[1]
- Identify what events may occur when your services should be considered or remembered.

Keep Referral Opportunities Top of Mind

- Let your network know of your desire to be referred.
- Consider amending your email signature to communicate the role referrals play in your business.
- Make referral conversations an active part of your dialogue with your network.

SHORE UP YOUR LINKEDIN AND OTHER SOCIAL NETWORKS

- Make sure your profile is 100% complete and informative to bolster credibility.
- When a potential referrer contacts you, mention you'll be connecting through LinkedIn in your response.
- Connect your LinkedIn profile to other business social platforms (i.e., Twitter, blogs). so posts will automatically update to your LinkedIn profile page.
- Ask for current and former client recommendations through LinkedIn.
- Ask for customer referrals – but make it easy. Look at the source's LinkedIn network to find introductions that interest you. Be specific when approaching them.

THANK YOU + STATUS UPDATES

- Include those who referred you in your success. A shared sense of accomplishment keeps all parties motivated.
- Always find a relevant and personalized way to share your thanks with a referral source.
- Consider thanking your referral source publicly through shared social media outlets including your LinkedIn networks.
- Put a note in your calendar 3-6 months into a referral-gained relationship that reminds you to provide the referral source with an update on the relationship.

1. Advisor Impact, Anatomy of the Referral, 2010.

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