

Referral Strategy Planning Template

1. WHAT ARE WE GOING TO ACHIEVE?

For example:

XX referrals per month

Xx% of new business to come from referrals

Keep it simple, not too many (maximum of 3 – not too many, too overwhelming)

2. WHO ARE OUR POTENTIAL REFERRERS?

Partners	Clients
<ul style="list-style-type: none"> Who are they? What is our current relationship with them? How do we currently interact with them? What channels would we use? How do they currently behave? What do they think about us? 	<ul style="list-style-type: none"> Who are they? What is our current relationship with them? How do they currently behave? What do they think about us?

3. WHO DO WE WANT THEM TO REFER INTO US?

Partners	Clients
Define the types of clients we want them to refer?	

4. WHAT DO WE WANT THEM TO DO?

Partners	Clients
Exactly what actions do we want our referrers to take.	

5. WHAT TOOLS / MATERIAL ARE WE GOING TO PROVIDE?

- Eg content, brochures

6. WHAT IS OUR PLAN?

What	Who	When
<ul style="list-style-type: none">• Who will do what by when• What steps will we take for each audience?• This should include:<ul style="list-style-type: none">o How we will communicate the programo How our staff will be briefedo Any internal changes we need to makeo What follow ups / reviews will we undertake?		

6. WHAT IS OUR PLAN? (CONTINUED)

7. HOW WILL WE INCENTIVISE THEM?

Partners

- XXX
- XXX

Clients

- XXX
- XXX