

# REFERRALS CHECKLIST

- Clients:
  - Current clients—buyers and important others.
  - Past clients—buyers and important others.
  - Pending or unsuccessful clients - If you have reached the proposal stage only to be turned down, you nonetheless have a good relationship with a buyer (and others you've met). There is nothing wrong with asking for referrals, which may be readily granted to atone for the guilt of having rejected your proposal!
- Professional contacts:
  - Attorney, accountant, printer, designer, dentist, doctor, and others.
  - Trade association colleagues.
  - Past and present alliance partners, collaborators, subcontractors.
- Civic and social contacts:
  - Family and extended family.
  - Town boards, networking, and social contacts.
  - Athletics and recreation involvement (e.g., Little League, Girl Scouts).
  - Children's school affiliations (e.g., PTA, drama club, field trips).
  - Charities, nonprofits, pro-bono work.
- Other:
  - Internet connections.(Facebook, Linked In, Twitter)
  - Political and fund-raising colleagues.
  - Hobbies and interest groups (teaching, hiking, stamp collecting, etc.).

## Steps to ensure a successful Referral gameplan

1. Send thank-you note for all referrals, whether worthwhile or not.
2. Reciprocate, unasked, with referrals to your list.
3. Plan and schedule in your calendar to methodically mine potential referrals list at intervals (e.g., quarterly).
4. Track best sources and highest quality, and focus on those more frequently.

## Remember to describe your ideal client:

- Any shared values may be important
- Why they would like being your customer
- Their demographic/sociographic profile
- What problems you help them solve

Read more about referrals at <http://joegirard.ca/best-way-to-get-a-referral>

