CL-03 Making referrals easy

SMARTer coaching content CL-03, version 3, 31 October 2026. The practice card: for the owner, shared by the coach. Key area: Clients. Capability: Referrals. Core card.



CLIENTS | CAPABILITY: REFERRALS

Practice card: who could recommend you, and do they know how?

The practice on a page

What it is

Most businesses that sell expertise will tell you, with some pride, that nearly all their work comes from referrals. Ask how they get referrals and there is a pause, then a vaguer answer about doing good work and people talking. Which is true, in the way that "the weather" is a true answer to how the garden got watered.

The practice: find out who has referred you, thank them properly, give people one sentence to repeat, and ask at the natural moments instead of hoping.

Why it matters to you

In Hinge's surveys of professional services buyers (Hinge is a US marketing company), the most common way to find a provider was to ask the network. 72% had never referred their provider because nobody had asked. Half of referred buyers ruled a provider out before calling, usually because they could not tell what it did. The people willing to recommend you exist. They need asking, and the words.

The one tool

The worksheet on the next page: where your last ten clients came from, and who referred them. Then thank three and ask three.

This week

Thirty minutes to list your last ten new clients and where each first heard of you. Then thank, by name, everyone who referred you and has not heard what happened. One rule from now on: every new enquiry is recorded with its source.

Worksheet: where your last ten clients came from

New client	Where they first heard of us	Who referred them (if anyone)	Thanked, and told what happened?

If you cannot remember where a client came from, ask them; they will usually be pleased you did. We will use this list in our session, and at 3, 6 and 12 months we will look at whether referred enquiries a quarter have moved.

Then: thank three, ask three.

	Name	Why them	What I will say or send	By when
Thank				
Thank				
Thank				
Ask				
Ask				
Ask				

Your one sentence, for people to repeat: We help _____ (who) with _____ (what), so that _____ (the result). For example: "We help owners of small accountancy practices move to fixed-fee pricing, so that they stop giving hours away."

Before we meet

1. Who has referred you more than once, and do they know how much it mattered?
2. If a client tried to recommend you tomorrow, what would they actually say?
3. Which of your clients would be glad to be asked?

Where you would need a specialist

If you plan to pay for introductions, or to be paid for them, check your professional body's rules first and agree the arrangement in writing. Marketing emails to individuals have rules too; the Information Commissioner's Office publishes guidance.

If you want more

The research in a few lines. Hinge's 2015 survey of 523 professional services businesses found that 81.5% had received a referral from someone who was never a client. The people who recommend you include anyone who knows your reputation. Its 2018 survey of 1,475 buyers found that asking the network was still the most common way to find a provider (59.5%, down from more than 70% in 2013), while online search had grown to nearly one in five. A referred buyer now checks you out before calling. A study of about 10,000 account holders at a German bank found that those who had been referred stayed longer and were worth at least 16% more than similar people who arrived another way. Banking, not expertise, but the shape is familiar.

A worked example. A consultancy with 12 people and fees of £1.4 million traces its last ten clients. Four came from clients or past clients, two from an accountant who introduces work, one from a former colleague, two from LinkedIn articles, and one is unknown. Seven came through someone who knew the owner. She had thanked two of the seven and told none how things turned out. She writes to the five. Her one sentence, sent to the accountant and a solicitor: "We help founders of technology businesses put a management team in place, so that the founder can step back." She asks three clients a quarter, at the end of work that went well. Her words: "You mentioned your investor has two other companies with the same problem. Would it help if I dropped them a line, or would you rather introduce us?" If half of the twelve she asks in a year introduce someone and she wins one in three, that is two new clients, about £72,000 in their first year. Illustrative; her own record will say what is realistic after two quarters.

If your referrals come from other professionals. For an accountancy practice or an adviser, the referrers are often solicitors, bankers and IFAs rather than clients. The practice is the same: trace, thank and tell them what happened, give them the sentence, and brief them twice a year on who you are looking for. An introducer who hears nothing back stops introducing.

If you run part of the business for the owner. If you look after clients day to day, you see the natural moments long before the owner does: the thank-you email after a deadline, the client who mentions a colleague with the same problem. Agree with the owner when you can ask, and make sure every enquiry is recorded with its source.

Keeping it going. Referral habits fade quietly: a busy quarter arrives, the thank-you notes stop, and six months later the phone has gone quiet. Settle now who records the source of every enquiry and keeps the thank and ask list, and in which meeting "who referred us,

who have we thanked, who have we asked?" is a quarterly item. Three dates in the diary: 3, 6 and 12 months from today. If the answer to "who have we asked?" is "nobody", ask one person this week.

About this card: one of the SMARTer practice cards, a well-tested way of running a business that sells expertise, on a page. Who you ask, and how, stays your decision. Sources: Hinge Research Institute (2015, 2018; Hinge is a marketing company); Schmitt, Skiera and Van den Bulte, Journal of Marketing (2011). The worked example is illustrative.

CL-03 v3, October 2026. © 2026 SMARTer Entrepreneurs. Shared for use in your own business. Please do not copy, adapt or distribute it without permission.