

CLIENTS I CAPABILITY: REFERRALS

Your referral map

Who has sent you work, who could, what they would say, and when to ask. Thirty minutes. Goes with practice card CL-03.

1. Where your last ten clients came from

Your last ten new clients and where each first heard of you. If you cannot remember, ask them. From today, every enquiry is recorded with its source.

	New client	Where they first heard of us	Who referred them (if anyone)	Thanked
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

2. Who could introduce you, and to whom

First, the sentence you want people to repeat. Then the clients, past clients, other professionals and contacts who know your reputation: the people willing to recommend you exist, they need asking and the words. "When to ask" is the natural moment: the end of work that went well, a thank-you, a review, a mention of someone with the same problem.

Your one sentence, for people to repeat	Fill in
We help (who)	
with (what)	
so that (the result)	

	Name	How they know us	Who they could introduce us to	What they could say about us (your sentence, in their words)	When to ask
1					
2					
3					
4					
5					
6					
7					
8					

3. Thank three, ask three

Thank, by name, three people who referred you and have not heard what happened. Then ask three who would be glad to be asked. Write what you will say or send, and when.

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

Keeping it going	Your answer
Of your last ten clients, how many came through someone who knew you?	
Who records the source of every enquiry from today?	
When, each quarter, will you ask "who referred us, who have we thanked, who have we asked?" (a meeting, or a date in the diary)	
How many enquiries a quarter come through referrals today? (a best guess will do)	

What I will do before we next meet

What I will do	By when	Done

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