

## **YOUR AGENCY'S REFERRAL PROGRAM**

The mission of our referral program is to:

Our goal for referrals in 2020 is:

Our goal for referrals in 2021 is:

We are going to organize our clients in our database by using (tags, lists, custom fields, deals, etc):

The automation we will use to request referrals is: (Example: You can use this one that we covered <http://tplshare.com/NlabKFg>)

The reward we are going to give our referrer, and possibly referee is:

The meeting in which we request referrals will be (annual review, QBR?):

The person asking for the referral will be (Agency owner, VP, AM on the account, can be a combination, etc):

10 Clients we can request a referral from today:

- 1.
- 2.
- 3.
- 4.

- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Our messaging will be (template here to customize):

Hello [Client name],

It has been such a pleasure working with you to help you achieve your goals. I knew we could help, and I'm pleased you're seeing results so quickly.

Since things are going so well, I found myself wondering if you have any colleagues at similar companies who would benefit from our [product/service]. I would love to help them achieve similar growth.

Regards,

[Your name]