

3 STEPS TO REFERRALS

Step 1 - Find Your True Advocates

- Survey every client [spouses included] as soon as the deal goes firm
- Call and thank every client who completes a survey
- Classify advocates based on permissions to publish [name/comment]
- Ask advocates if they'll act as a reference with new clients
- Give priority to advocates in your CRM system
- Call clients who didn't complete a survey
- If a client has a complaint – make it right

121 QA Marg Cunningham

1 Survey Archives [3 Steps to Referrals](#)

2 "Marg Cunningham is an experienced agent who inspires trust and confidence. She is a true advocate for her clients, knowledgeable, dependable, and on top of every detail."

3 Permission to publish comment. Permission to include my name.
Name: Malcolm Wood
Address: 1234 Brook Ave

4 Scorecard measures:

			Strongly Disagree 1	Strongly Agree 7
Loyalty	1	Satisfaction	○ ○ ○ ○ ○ ●	
	2	Referral	○ ○ ○ ○ ○ ●	
	3	Retention	○ ○ ○ ○ ○ ●	
Appearance	4	Equipment	○ ○ ○ ○ ○ ●	
	5	Facilities	○ ○ ○ ○ ○ ●	
	6	Personnel	○ ○ ○ ○ ○ ●	
	7	Materials	○ ○ ○ ○ ○ ●	

5 I will recommend my agent to other people.

- 1 Click to see all surveys stored in your personal archive
- 2 Testimonials: your most effective sales tool
- 3 Permission to share     
- 4 Advocates who will spread good word-of-mouth
- 5 Client insights on the quality of your service

Step 2 – Share Their Testimonials

- Post authorized testimonials [with names/addresses] on your website
- Add a great testimonial to your email signature block
- Add testimonials to all your marketing materials
- Make it easy for advocates to share their comments on social media

Dear Malcolm,

I really appreciate your agreeing to post your comments on Facebook.

Marg Cunningham is an experienced agent who inspires trust and confidence. She is a true advocate for her clients, knowledgeable, dependable, and on top of every detail.

Malcolm Wood, 1234 Brook Ave

Just open the link and paste your comments to -

<< Insert Facebook Company URL >>

Thank you. Regards

Step 3 – Stay Top-of-Mind

- Send useful information advocates can share with friends and followers:

Moving checklist	www.atlasvanlines.ca
Home decorating & decor	www.hgtv.com
Space planning	www.homestyler.com
Choosing paint colours	www.benjaminmoore.com
Contractors	www.homestars.com

- Provide a short electronic bio: What I Do | Why Me
- Tailor your bio to the advocate's profile, e.g. first time buyer, senior
- If an advocate makes a referral - request a personal introduction
- Keep advocates in the loop as referred deals progress
- Send a gift when the referred deal closes
- Invite your advocates to an annual thank you party
- Stay in touch by sending up-to-the-minute insights on local real estate