

# 3 STEPS TO REFERRALS

## Step 1 - Find Your True Advocates

- Survey every client [spouses included] as soon as the deal goes firm
- Thank every client who completes a survey
- Call clients who didn't complete a survey
- If a client has a complaint – make it right
- Classify advocates based on their responses and permissions to publish testimonials
- Give priority to advocates in your CRM system

The screenshot shows a survey interface for 'Marg Cunningham'. At the top left is the '121 QA' logo. Below it is a blue button labeled 'Survey Archives' with a callout '1'. A testimonial quote is displayed with a callout '2'. Below the quote are two checked checkboxes for 'Permission to publish comment.' and 'Permission to include my name.' with a callout '3'. The respondent's name 'John Smith' and address '555 Main' are listed. A 'Scorecard measures' table follows, with a callout '4' pointing to a highlighted row: 'I will recommend my agent to other people.' The table has columns for 'Loyalty', 'Satisfaction', 'Referral', 'Retention', 'Appearance', 'Equipment', 'Facilities', 'Personnel', and 'Materials'. Each row has a score from 1 to 7 and a corresponding number of filled circles. A callout '5' points to the bottom of the scorecard table.

Scorecard measures:			Strongly Disagree 1	Strongly Agree 7
Loyalty	1	Satisfaction	●●●●●●●	●
I will recommend my agent to other people.	2	Referral	●●●●●●●	●
	3	Retention	●●●●●●●	●
Appearance	4	Equipment	●●●●●●●	●
	5	Facilities	●●●●●●●	●
	6	Personnel	●●●●●●●	●
	7	Materials	●●●●●●●	●

- 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 – Advertise Their Testimonials

- Post authorized testimonials [with names/addresses] on your website
- Add a great testimonial to your email signature block
- Post a testimonial of the month on the social media of your choice
- Add testimonials to all your marketing materials

## Step 3 – Stay Top-of-Mind

- Send useful information that clients can share electronically:

Moving checklist	<a href="http://www.atlasvanlines.ca">www.atlasvanlines.ca</a>
Home decorating & decor	<a href="http://www.hgtv.com">www.hgtv.com</a>
Space planning	<a href="http://www.homestyler.com">www.homestyler.com</a>
Choosing paint colours	<a href="http://www.benjaminmoore.com">www.benjaminmoore.com</a>
Contractors	<a href="http://www.homestars.com">www.homestars.com</a>

- Send a personal bio: What I Do | Why Me
- Tailor your bio to the client's profile, e.g. first time buyer, senior
- Request a personal introduction to anyone they recommend
- 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