

THE ART OF REFERRALS

re·fer·ral

/rə'fərəl/

noun

an act of referring someone or something for consultation, review, or further action. the directing of a patient to a medical specialist by a primary care physician. a person whose case has been referred to a specialist doctor or a professional body.



1 QUALIFY THE REFERRAL

Find out what the person actually needs. Ask discovery questions to find out more about the person and exactly what services they need. Share this information with the person you are referring the customer to.

2 EDIFY THE PERSON BEING REFERRED

Speak about whom you will be referring. Edify them by explaining what the person does, and what makes them a great referral.

3 ESTABLISH TIMELINE

Figure out timing of the referral. Unless urgent, tell the client that the person being referred will connect with them within 48 hours. If possible, find out when the best time for the client is to talk with the referral.

4 GATHER CONTACT INFORMATION

Gather the clients phone number, email address, discovery notes, what means of communication and when is the best time to contact the client. Relay this information to the referral.

5 SET THE REFERRAL PROCESS

Set the expectations for the referral. Explain the time-line discussed and what you expect out of the referral process. Discuss any details and pertinent information they need to be aware of before they contact the client.

6 MAINTAIN COMMUNICATION

Maintain communication and support both the client and referral. Ask the client if their expectations are being met and if anything needs to be addressed with the referral. relay any helpful information to the referral.

7 COMPLETION

Once the business has been completed, follow up and discuss with the referral how the process went so you both can determine if anything needs improvement for the future.