



The  
Concierge Academy™



## **Module: Referral Marketing**

### **9 Step Referral Marketing System**

**Step 1: Create Targeted List** (Use your Excel File from Ninja Networking) 250 x 250 Rule

(Use a separate sheet of paper to start collecting all the contacts you have that could become a REFERRAL partner for YOU and your business.)

- List all your local friends
- Local family
- Neighbors
- Business Connections
- People you have networked with in the past
- People you meet at events
- Current Clients
- Past Clients



**Step 2: List Your Ideal Client** (You can't ask for what you want unless you know what you want).

Who is your ideal client? Use the space below to list EXACTLY who your ideal clients are. (If your ideal client is a female executive of a fortune 500 Co. write that). (If your ideal client is a senior citizen who still lives at home but needs support with errands and light housekeeping, write that).

Each Referral request should CLEARLY identify ONE CLEAR ideal client profile.

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**Step 3: Create a Referral Education System** (List 1 topic per month to use as your way of educating and ASKING for referrals, connections and resources).

Jan \_\_\_\_\_

Feb \_\_\_\_\_

March \_\_\_\_\_

April \_\_\_\_\_

May \_\_\_\_\_

June \_\_\_\_\_

July \_\_\_\_\_

August \_\_\_\_\_

Sept \_\_\_\_\_

Oct \_\_\_\_\_

Nov \_\_\_\_\_

Dec \_\_\_\_\_

### **Step 4: Personalize your Follow Up**

Have on hand for your Referral Marketing System

- Purchase branded stationary/note cards
- Create simple letterhead with logo and contact info
- Purchase birthday cards
- Branded Holiday cards
- Bonus idea
- Bonus Idea

### **Step 5: Meet Those “A-listers”**

Use the space below to list your “A” list. (You’re “A” list is MOST important and should be carefully selected. These are POWER advocates. They are already demonstrated that they know how to refer you, and would champion YOU and your company. These are the people you spend marketing dollars on).

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Once your list has been A-B-C ... Reach out for “coffee” with all you’re A-listers. **You should aim to meet with 10 people per month.** If you only have 3 “A’s”, continue to nurture and convert your B’s to A’s.

1. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

2. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

3. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

4. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

5. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

6. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

7. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

8. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

9. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

10. Name: \_\_\_\_\_

Scheduled “coffee” Date: \_\_\_\_\_

**Step 6: Educate your Vendors and JV Partners** (these are PART of you’re a list!)  
Remember that these are people who “make money when you make money”!!

Use the space below to List your Vendors and JV:

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**Step 7: Reward your referrers** (make this part of a repeatable system so you do NOT forget). You can send small gifts. GC for a local coffee shop. If you know them more intimately, send something of value to their life. Chocolates. Candies. Coupons for Free Ice-cream. Holiday Pies.

Send a Branded Thank You card

Send a GIFT

**List ways you can “reward” your “A-list referrers” 2-4x a year**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**Step 8: Always Follow Up (no matter what)**

Immediately send a thank you to “referrer” for the referral (no matter outcome)

Follow up with Referrer (This is where we are/ when we start/ not a good fit?)

If converts, send a tangible gift

Follow up with the Referral

If referral NOT ready to make a buying decision (add to your KIT campaign)

**Step 9: Rinse and Repeat**

Put this as a reoccurring appointment ON your calendar