

Building Your Personal Referral Marketing Plan

PRACTICAL TAKEAWAY

Complete the first two steps of your referral marketing plan before the next meeting: write your monthly referral goal and list your top 5 Contact Sphere relationships by name.

Monthly referral goal (# of referrals)

Target revenue per month

Realistic conversion rate from referral to client

Contact Sphere #1 — name & profession

Contact Sphere #2 — name & profession

Contact Sphere #3 — name & profession

Contact Sphere #4 — name & profession

Contact Sphere #5 — name & profession

My 1:1 cadence (per partner / per month)

My follow-through system (tool / process)