

Referral Request Process Worksheet

Use this systematic approach to build a consistent referral generation throughout your sales process.

1. Process - Mention Referrals Throughout Sales Process

Build referral awareness from the beginning

When to Mention Referrals:

- Initial discovery call: ☐ "Part of how we grow is through referrals from satisfied clients"
- Proposal presentation: ☐ "We'd love to help other companies like yours"
- Contract discussion: ☐ "We hope to earn the right to ask for referrals"
- Implementation planning: ☐ "Success stories help us reach similar organizations"

Referral Mention Scripts:

- Early in process:
- During needs assessment:
- At proposal stage:
- During implementation:

Integration Points:

- Sales presentation slides that mention referrals
- Email signatures with referral requests
- Case studies that highlight referral relationships
- Thank you notes mentioning future introductions

2. Ask - Be Specific in Your Referral Requests

Make targeted, detailed requests for maximum success

Who: (Name or specific title)

Company Name:

Where Located:

What Priorities/Responsibilities:

- Business challenges they face:
- Initiatives they're likely managing:
- Goals they're trying to achieve:
- Pain points they experience:

Sample Specific Ask: "I'm looking to connect with [Name] or a [Title] at [Type of Company] in [Location] who is responsible for [Specific Priority]. Do you know anyone who fits this description?"

Timing for Asks:

- Post-win (after successful implementation):
- Post-loss (after respectful relationship):
- Bi-annual check-ins:
- Annual relationship reviews:

3. Track - Monitor All Referral Activities

Systematically track mentions, asks, and follow-ups

1. Pre-Sale Mention Tracking:

Prospect Name	Date	Sales Stage	Mention Type	Response	Notes
---------------	------	-------------	--------------	----------	-------

2. Post-Win Ask Tracking:

Client Name	Win Date	Ask Date	Specific Request	Result	Referral Received
-------------	----------	----------	------------------	--------	-------------------

3. Post-Loss Ask Tracking:

Prospect Name	Loss Date	Ask Date	Specific Request	Result	Future Opportunity
---------------	-----------	----------	------------------	--------	--------------------

4. Bi-Annual/Annual Follow-Up Tracking:

Contact Name	Last Ask Date	Follow-Up Date	Type	Request Made	Response	Next Follow-Up
--------------	---------------	----------------	------	--------------	----------	----------------

Key Metrics to Monitor:

- Mention rate during sales process: ____%
- Post-win ask rate: ____%
- Post-loss ask rate: ____%
- Annual follow-up completion rate: ____%
- Referral conversion rate: ____%
- Quality of referrals received: ____%

4. Assess - Analyze Success Patterns Annual Review

Identify what works to replicate success and generate more referrals

Annual Assessment Questions:

Language Analysis: Which referral mention phrases got the best response? 1. 2. 3.

Timing Analysis: When in the sales process were mentions most effective?

Circumstances Analysis: What client situations produced the best referrals?

Success Patterns to Replicate: Most successful referral sources:

Areas for Improvement: Where did you miss opportunities to mention referrals?

Next Year's Referral Goals:

- Number of mentions target:
 - Number of specific asks target:
 - Referral conversion rate goal:
 - New referral sources to develop:
-

Implementation Action Plan

Immediate Actions:

☐ Update sales materials to include referral language

☐ Create specific ask templates

☐ Set up tracking system

☐ Schedule quarterly referral reviews

90-Day Goals:

☐ Integrate referral mentions into all active sales processes

☐ Make specific asks to all recent wins/losses

☐ Complete referral ask training with team

Annual Planning:

- Goal for referral-generated opportunities: _____
- Target referral conversion rate: _____%