

Marketing Working Group

Topic: Building a client referral program

May 2018

Important information

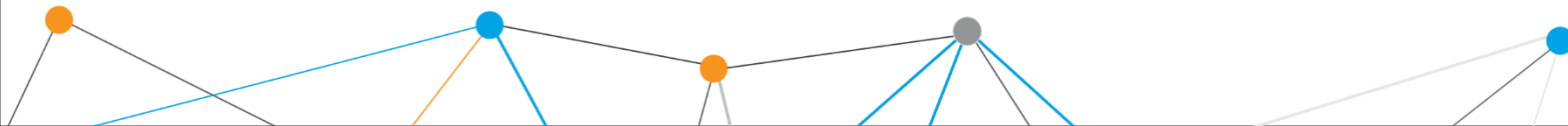


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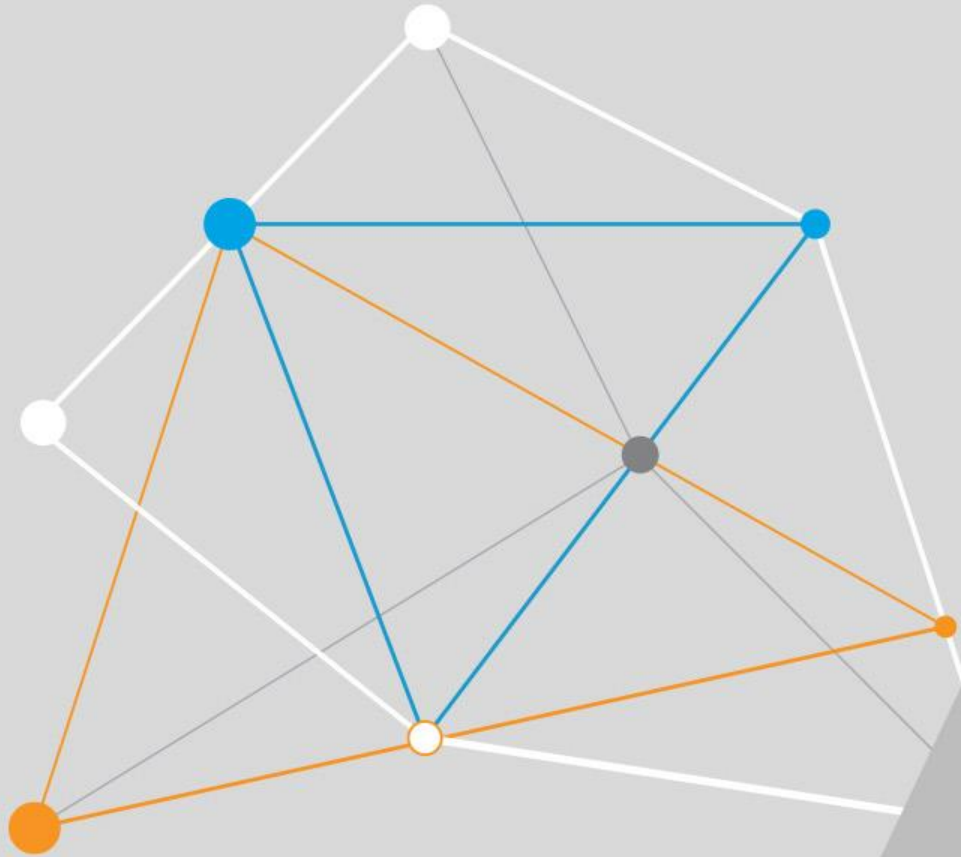
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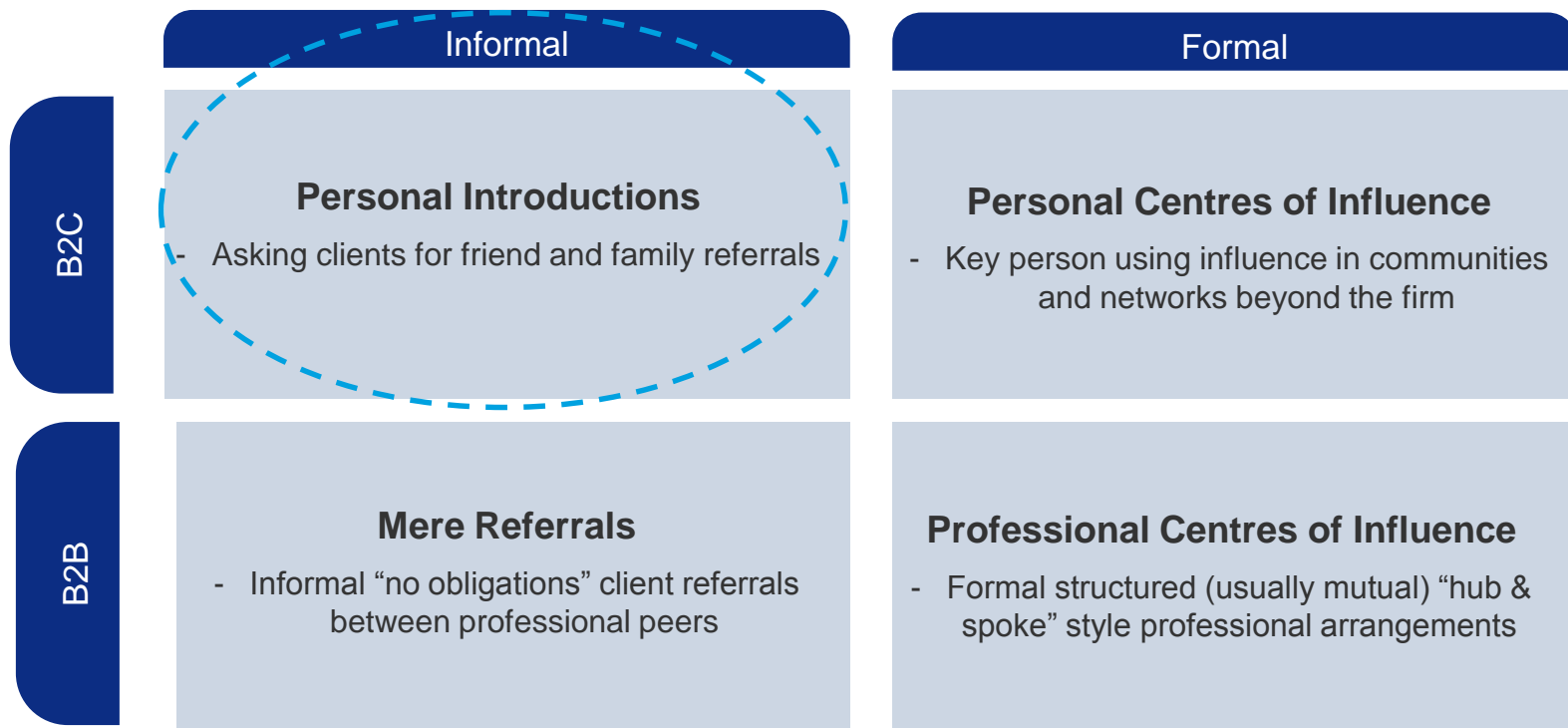


Welcome to the VAN Marketing Working Group

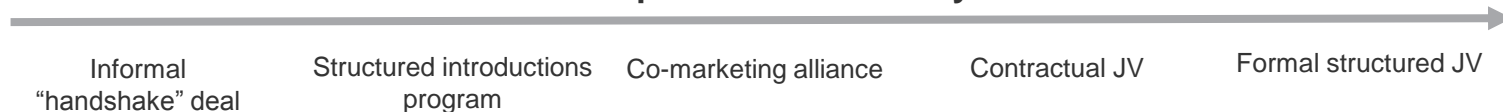
- Objectives
- Frequency



Building a client
referral program



Spectrum of formality



Why a client referral program?

To close the referral gap

71% highly likely to recommend your firm

49% have recommended in the past 12 months

What kind of clients are most likely to refer?
Those who are asked.



What do we mean by referrals?

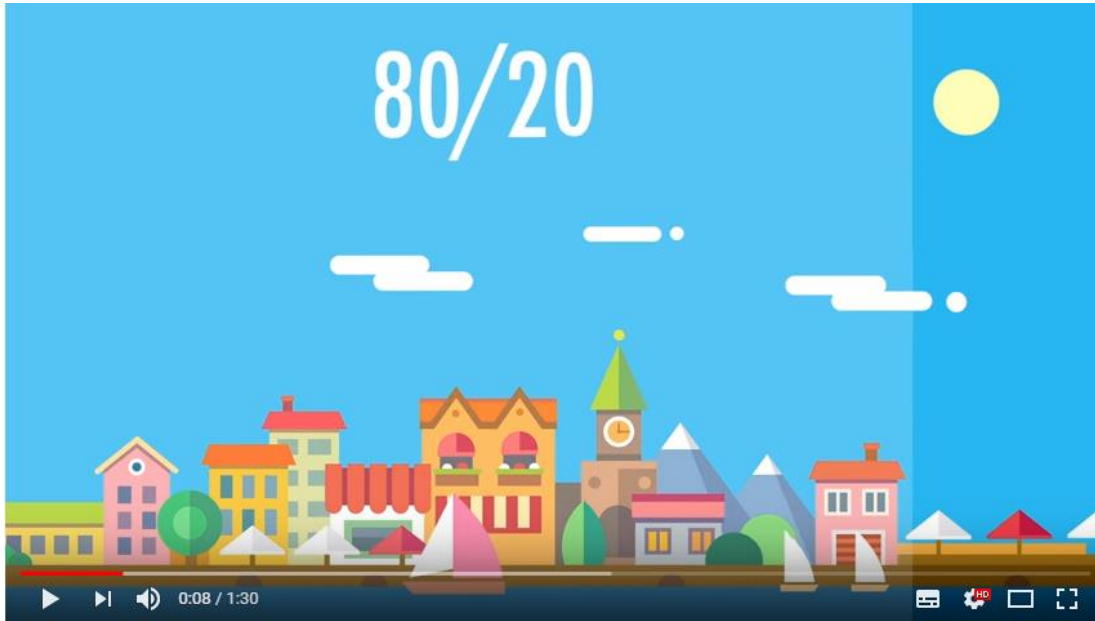
Refer

Recommend

Personal
introduction

Personal
favour

What kind of referrals do you want to attract?



How can we invest in generating referrals who are as valuable as our top 20% of clients?


How do we generate referrals?

1.
Clarify your
value

2.
Ask

3.
Say
thank you

What tools do we use to embed referrals in our business?

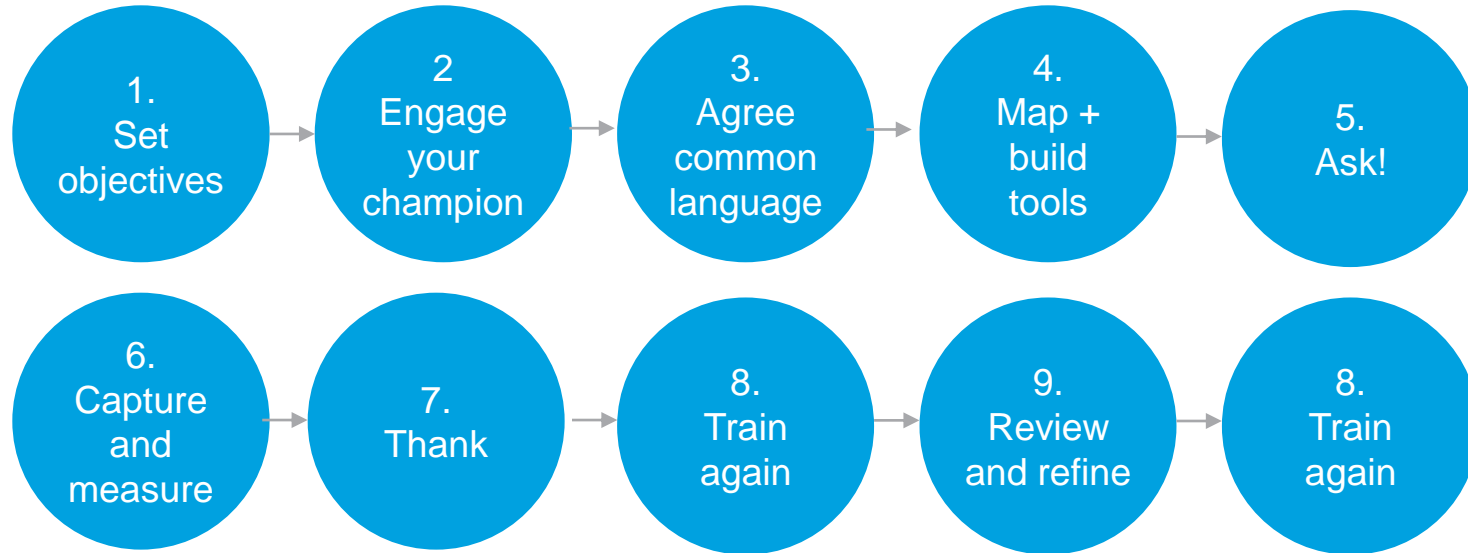


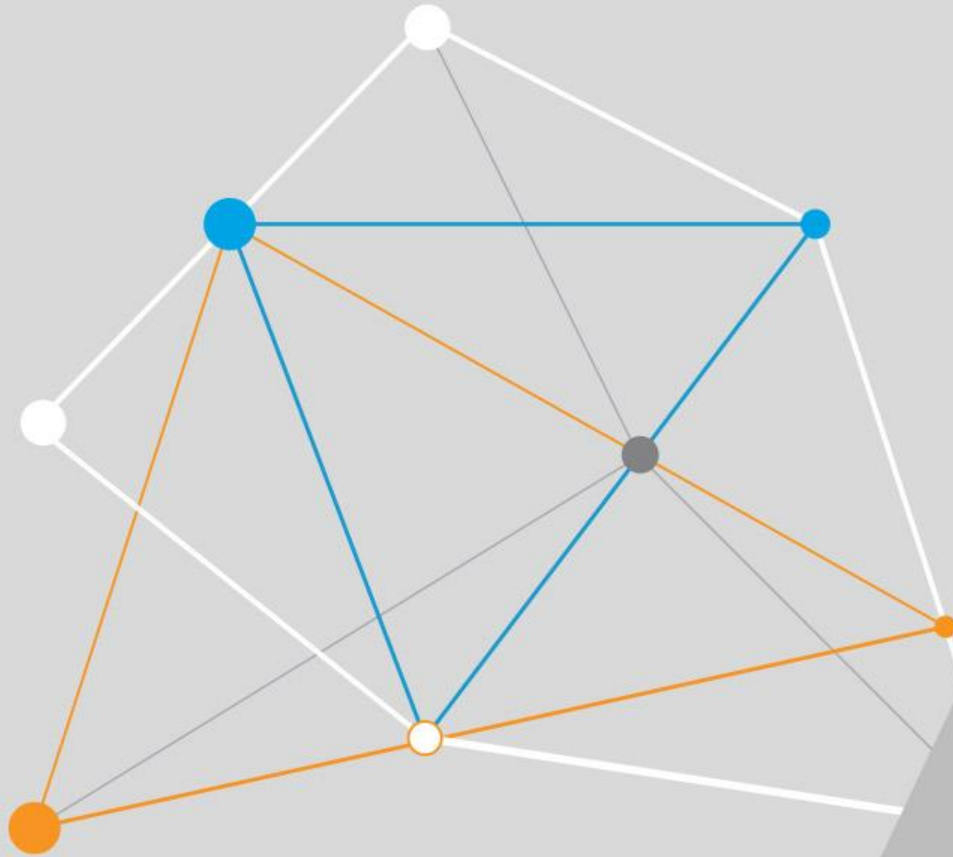
Systematise
+ equip

Train your
team

Leverage
your data

Summary

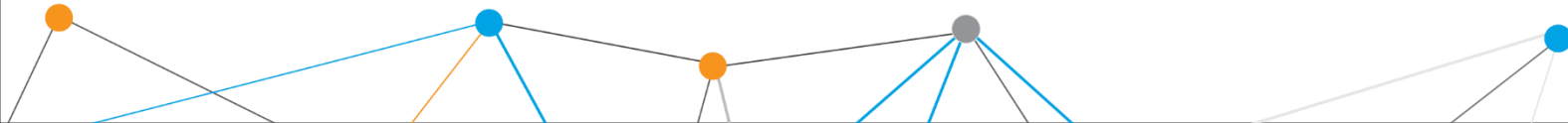


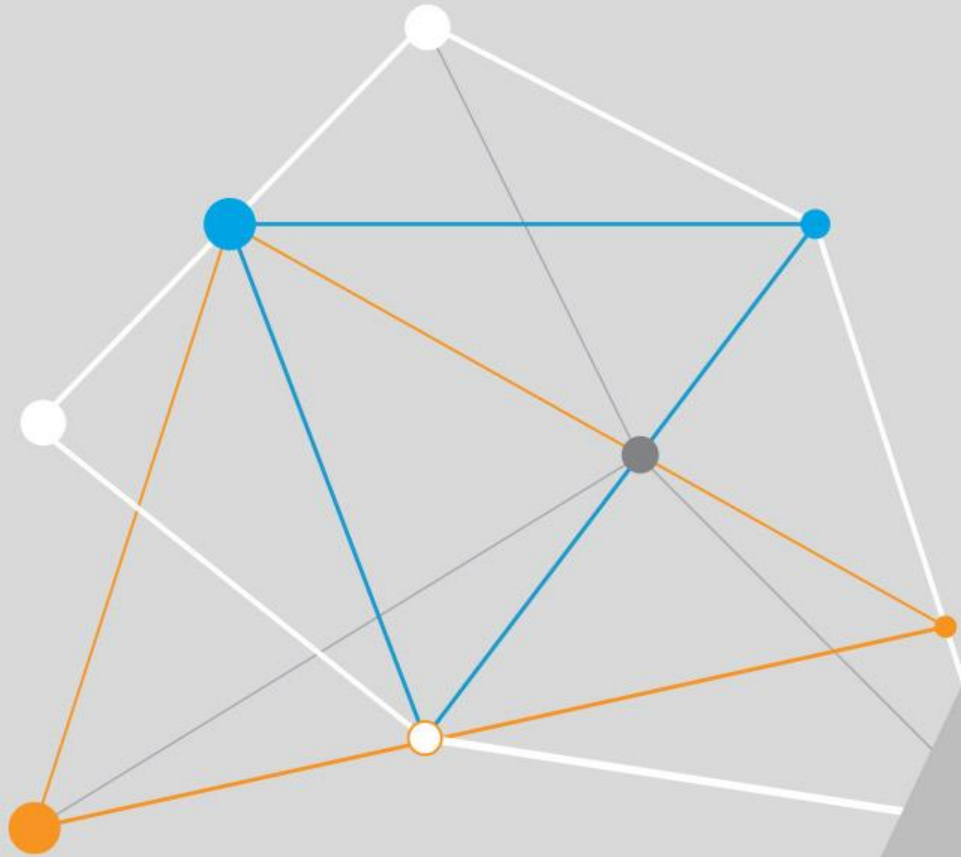


Keep, lose, gain

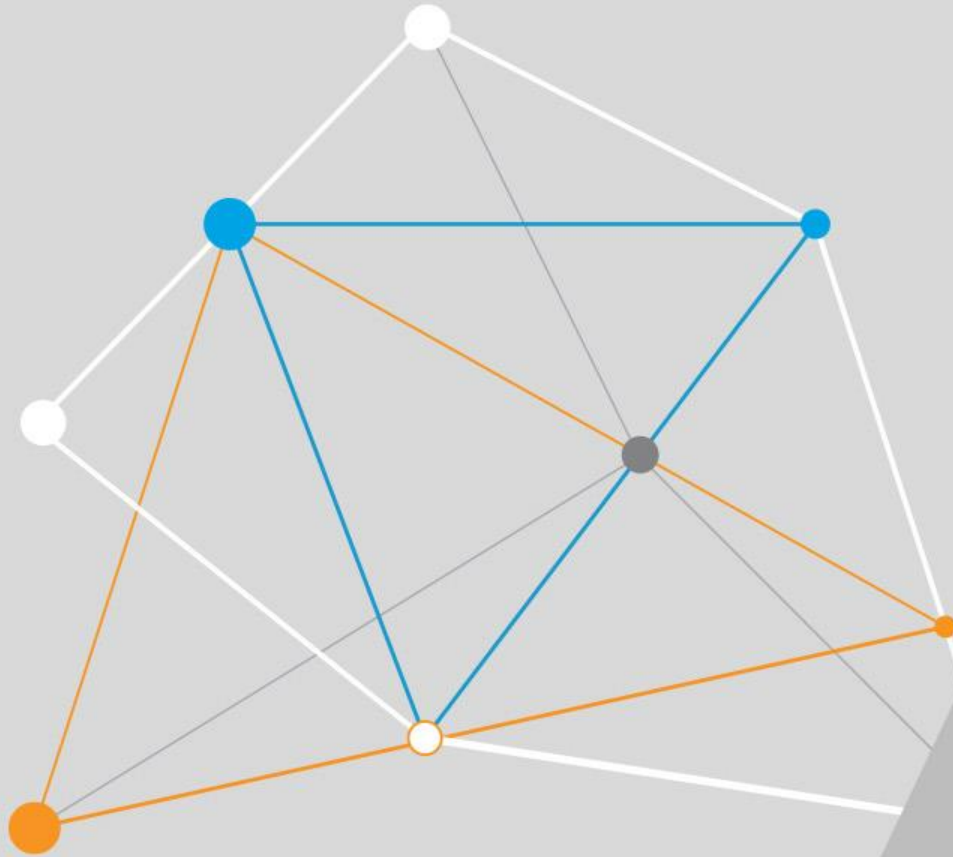
Attracting more referrals | Keep, lose, gain

To attract more referrals what activities do we need to keep ?	To attract more referrals what activities do we need to lose ?	To attract more referrals, what activities do we need to gain ?

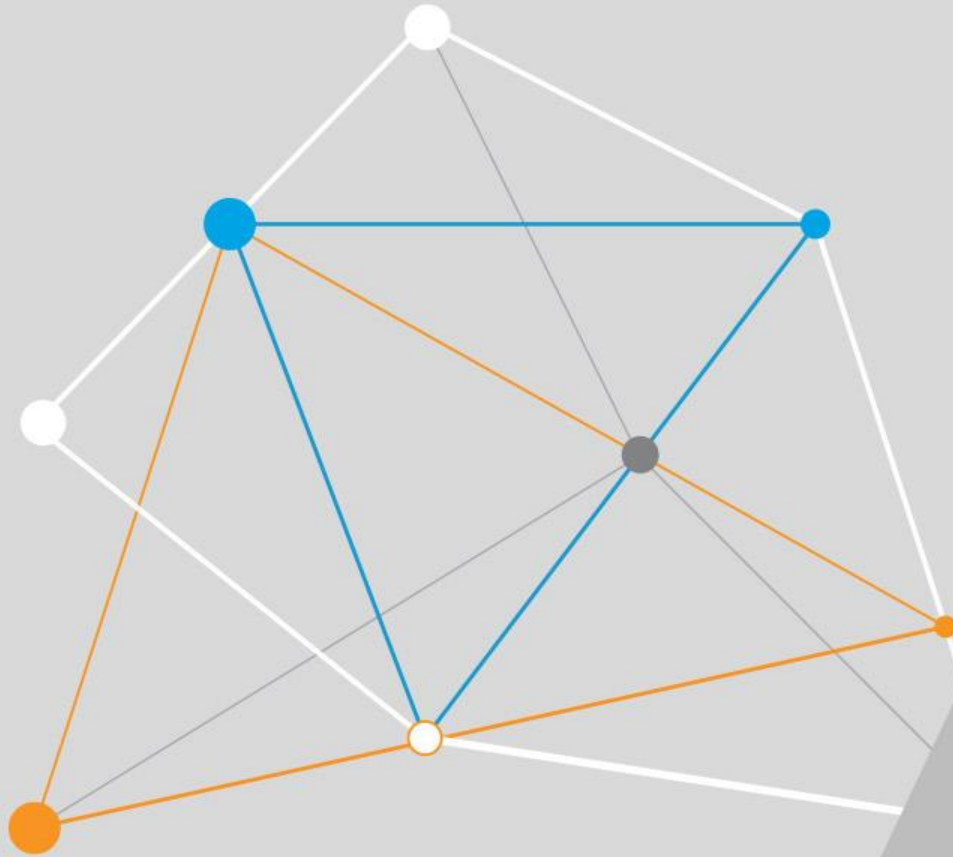




What action
will you take?



Future session topics



Questions?