Maximizing Referral Generation

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1. Objective of Maximizing Referral Generation:

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2. Rate your Organization (1 to 10) in generating referrals from within:

   _____

3. Rate your Organization (1 to 10) on consistent use of soliciting referrals from clients and prospects with an "offer to assist":

   _____

4. What are the obstacles or biggest challenges to consistently generating referrals within your Organization?

   _____

   _____

   _____

   _____

   _____

5. What are the obstacles or biggest challenges to consistently soliciting referrals from clients or prospects?

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6. Why should we generate or solicit referrals? What are the benefits to the Organization? What are the benefits to clients or prospects?

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_____

7. What are the four basic ways we identify opportunities?

1) _____

_____

_____

2) _____

_____

_____

Sub-Categories:

a. _____

_____

_____

b. _____

_____

_____

c. _____

_____

_____

3) _____

_____

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4) _____

_____

_____

8. Where we can look for referral opportunities?

_____

_____

_____

_____

_____

9. How do we coach our referral sources?

1) _____

_____

2) _____

3) _____

10. What are four recommended Referral Sources:

1) _____

2) _____

3) _____

4) _____

_____

11. Tips for Mastering Referral Generation

1) What is the benefit of teaching basic product knowledge?

_____

_____

_____

2) Why should we take the next step and go over and above basic product knowledge?

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_____

Referral Solicitation

1. What are the four sources for obtaining referrals?

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    _____

2. What are the Big Five Actions I will personally take to raise the level of referral generation in my area of responsibility?

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