

## Precisely Planning your Referral Program

The first step to launching a referral program is knowing what referral program "pilot(s)" will stimulate the most growth opportunities. Will it be a . . .



### Customer referral program

A customer referral program increases customer engagement and naturally taps into the customers that want to share the value of your business with peers that have comparable needs to their own.



### Partner referral program

When implementing a partner referral program you gain the ability of leveraging the large pool of potential ambassadors who interact with the target buyers.



### Employee referral program

With an employee program you can target your business employees and incentivize them to refer their friends and family to your business. This can be a lucrative addition to a customer or partner program.

## But how do you select a referral program?



Choose a **customer** referral program if you have a strong customer base who has access to potential buyers.



Implement a **partner** referral program if you have an existing base of referral partners that are under performing.



Start an **employee** referral program if you have a large employee base that has access to potential buyers or if your industry is restricted from rewarding customers.

And don't forget, when planning your referral program there's no such thing as stupid questions, only uneducated answers.

## Take advantage of your sales team's knowledge base and insight into customers and partners by asking them:

### How are they currently getting referrals?

If you are currently getting referrals ask your salespeople how and when referrals come in so you can understand how to streamline in a way for sales to continue what is already working while leveraging technology to generate even more referral activity.



### Can they help you recruit advocates?

If yes, you'll want to integrate your program into your CRM and make it an easy one-click invite from a contact record.

### Would the sales team appreciate the ability to input referrals on behalf of advocates?

When sales or customer success is communicating with an advocate there is an opportunity to ask for referrals. Consider providing them the ability to input trackable and attributable verbal referrals to make referring easy for advocates.

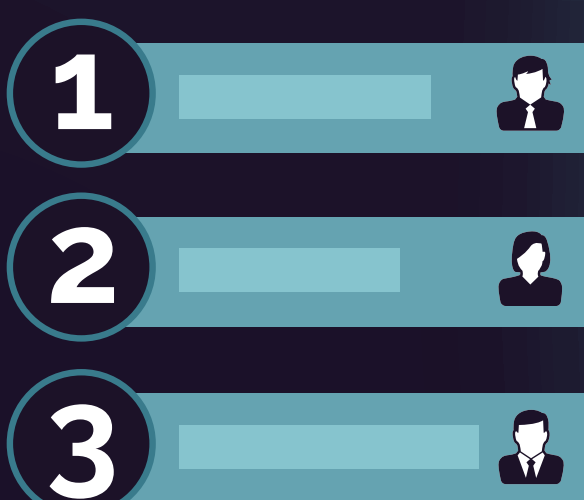


### Do sales leaders want support to ensure that sales follows through on referral leads?

If so, referral automation software can automate email updates and notification for salespeople when they get new referral leads and when their advocate has a successful referral.

### Is sales management interested in specific program metrics to help manage their team?

If yes, you'll want to include reporting dashboards on sales referral program performances so that this can be tracked and displayed with leaderboards to motivate achievement of the goals.

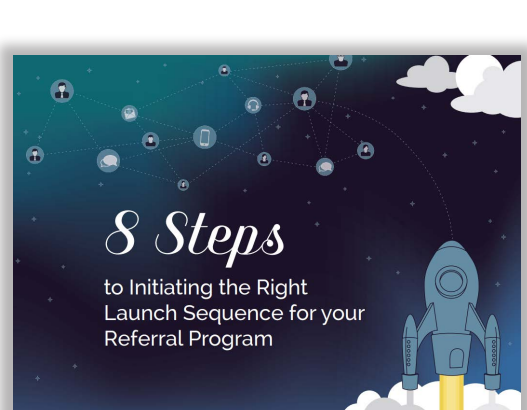


### Should you consider more than one referral program?

If you have different communication styles with different customer demographics or partners, different reward strategies, or a variety of referable products, it would be advantageous to implement more than one referral program to tailor the advocate experience.

### How should referral leads be routed?

Consult with your sales leaders and consider allowing referral leads to route to the salesperson that has the strongest relationship with the referring advocate.



Want to learn more about what goes into developing a successful referral program? Download the full e-book, **8 Steps to Initiating the Right Launch Sequence for your Referral Program.**

