

# Tipsheet

## How to ask for referrals

Referrals can be a key source of growth for your business—as long as you ask for them. Follow these tips to proactively ask for a referral.

### Ask the right people for a referral

- Email the client an automated survey a week after the purchase
- Ask “How likely is it that you would recommend [the company] to a friend or colleague?” and give a scale of 0 to 10, with 10 being the most likely to recommend

### Ask for a referral the right way

- Soften a sales-y tone by focusing less on how clients can help your firm and more on how you can help clients and their friends
- Make the referral process easy on clients: Ask them to submit contact information via a web form, send a link to be shared on social media, or offer a copy-and-paste message to send to a friend
- Call the referred client or send a one-off email requesting permission to send further communication to prevent emails being marked as spam

### Respond to survey results

- For a 9 or 10, send a thank you email that asks for a referral
- For a 7 or 8, add the client to an automated email series offering additional support and educational resources
- For a 0 to 6, call the client to find out how to improve the experience

### Choose an incentive

- Offer VIP access, like an event invitation, free turnkey legal services, or enrollment in a loyalty program
- Give a shout-out on social media