

Referral Skills Test

Use this checklist to see how confident and effective you are with referrals. The only thing that really counts in your efforts to get referrals are your actions and attitudes - with actions being the most important. Attitudes, while important, do not necessarily produce results. More often than not, there is a direct relationship to your confidence with referrals and your skill with referrals.

Rank your level of confidence/skill with this 1-3 scale:

1 = Not doing much here - lack confidence.

2 = Doing okay, but could boost level of activity and confidence.

3 = Doing quite well here; could teach others.

Skill or Attitude		1 Low Confidence	2 Medium Confidence	3 High Confidence
1	I have fully committed - in action and attitude to building a referral-based business.			
2	I follow a very specific process with all (or most) of my clients to make sure I provide maximum value early in the relationship.			
3	I have a well-defined client service model that keeps me on track in how I stay in touch with my clients and keeps my ongoing service at a high level - at least with my 'A' and 'B' clients.			
4	I have a written vision statement for my business, which I have rehearsed and communicate to the clients. All of my 'A+', 'A' and 'B' clients know that I am open to taking on the right new clients.			
5	I am in the regular habit of planting referral seeds such as "Don't keep me a secret," etc.			

6	I am in the regular habit of checking in with my clients to see where I stand with them; to fix problems and shed light on the value they have received.			
7	I have written out my script for asking for referrals.			
8	I am asking for referrals, using a system that works for me, on a regular basis.			
9	When I get referrals, I learn as much as I can about the new prospect to qualify them for my business and to insure a quality first conversation.			
10	I get the referral source involved in connecting (introducing) me to the new prospect.			
11	I contact referral prospects as soon as I can and keep the referral source in the loop.			
12	I send small gifts to people who give me referrals, even if the prospect doesn't become a client.			

13	I ask my new client to thank the referral source - validating the introduction.			
14	I have created a list of clients who love me - and asked them for referrals.			
15	I have identified the clients who have already given me referrals - even without asking - and have asked them for more referrals.			
16	I have identified my 'A+' clients - the ones I want to clone, and have begun setting up meetings with them to ask for referrals.			
17	I have a process for keeping track of new referral prospects so none of them slip through the cracks.			
18	I follow up with referral prospects in a professional way until it is clear they will never become a client of mine.			
19	I host client bring-a-friend events at least twice per year.			
20	I host client-appreciation events to build business friendships and keep these separate from my referral events.			

Rate yourself!

50 - 60 points: Congratulations! You are on your way to growing a healthy business or practice.

30 - 59 points: So far so good! You are engaged in the referral process, but have much room for improvement.

0 - 29 points: You're stuck! Are you committed to referrals as a way of growing your business or practice? You need to get help!