

Client Name Withheld

Marketing Brief

Project: Referral Marketing Program

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Overview

How do we grow the referral program and increase the Circle of Influence? That is the \$1.5 million dollar question (the amount we want to grow the business to in the coming year). With 42% of new business coming from referrals this is probably the most important marketing we need to be doing.

Aims and Objectives

To continue to grow the business through referrals

To increase the circle of influence sending us referrals

To get BETTER customers from referrals

To better recognize WHO our referral sources are and market to them.

Audience

- Other lawyers in non-competing areas, i.e. divorce attorneys
- Point of sale finance directors: car dealers, mortgage brokers
- Active businesses selling to the same group we are
- THERAPISTS!
- Past, present and non-clients whose cases we didn't take but all still found value in what we do and trust us
- Ages 53-65, those worried about their impending retirements, their adult children, their aging parents (The 3 for 1)
- Those in the 10 mile radius of our offices

Design Specifics

There are several ways to design a program that works. Some ways work for one referral source that may not work for another. Here are my suggestions:

- A separate printed or emailed newsletter for business referral sources, with interesting content that explains who we are (we can't assume they know) and what we can do FOR THEM, as well as invite referrals. They will need different information than what we provide in our general newsletter. You will know what that information is more than I. I will look for your story ideas.
- Seminars for therapists. Award CPE credits. Teach them about bankruptcy and teach them how to make referrals.
- Collaborate on books or pamphlets with other professionals who are marketing to the same group!!!!
- Solicite links on your website for their business and GET LISTED on theirs! Be a guest blogger to help them first...even if they never refer, its a marketing resource for you.

This is all so easy because the information exists already in the data bank of articles, dvds, videos and other materials we've developed for our own direct marketing.

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Budget

There COULD BE NO budget needed for much of this, except time. Email blasts (newsletters) are free. Sales calls on these potential referral sources cost time only. Hire a sales person who works mostly for commission. A printed newsletter, of course, would cost money, but you wouldn't have to do it frequently. A quarterly printed newsletter would be effective to an educated businessperson who has a tremendous memory for a value-added partner!

Content Specifics

- Interview "heard" leaders in our community. Let them contribute an article to our newsletter. They'll distribute our newsletter to their herd if they are featured in it.
- Teach people how to refer; give them tools: printed pieces, DVDs, cds, books, youtube, website. They can't screw up the referral then...because you've taught them what to do.
- Thank them in the referral source newsletter publicly...that promotes them and you. If they are featured, they are likely to forward the newsletter onto people.
- Pay it forward program...Headline for newsletter: "We'll pay for referrals. Make a referral and we'll donate to Dayton's Community Blood Center and Organ Donation in your name."
- When clients refer, thank them. Thank them with cards. Thank them with personal phone calls. Thank them with extra brochures, businesscards, Shock & Awe materials that they can forward.

Lifetime

Ongoing challenge and effort!

The Plan

When we meet next, let's discuss what your preferences are for moving forward on a plan for referral marketing. I say we DO IT ALL!

Conclusion

Take-aways:

- Know who your referral sources are.
- Do what you can for them first and then enjoy their referrals after. Make it not all about you. Creates value for both of you.
- Constant creation of media: Dvds, books, videos, pamphlets, books...and co-venture with other referral sources on this.
- Thank your referrals, whether clients or business referral sources. There are some ethical ways to do so.

