## Meet, Track, and Measure

A firm-wide referral culture requires open-minds, commitment, and accountability.

Meet frequently to review the pipeline, results, upcoming events, best practices, and how to content to ensure that team members are educated about the referral process.

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*Best Practice: Share success stories! Discuss what is or not working. Brainstorm ideas.*

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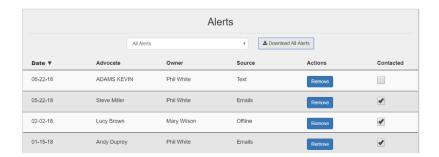
Record every referral. Track them in a CRM, database, or spreadsheet. Make sure you can see; the who, what, when and how of each referral at a glance.

Here is a simple example using Excel:

| | A | B | C | D | E | F | G | H | I | J | K |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Date | Advocate | Email | Phone | Message | Testimoni | Info Name | Info Email | Info Phone | Info Sourc | Contacted |
| 2 | Thu Jul 6 16:34:48 | Junior Reed | jr@jr.com | 649-7733 | Mary, I have a close f | | Mary Wils | mary@mackcomp.co | | Social Mec | TRUE |
| 3 | Thu Jul 27 14:55:49 | Monty Lennon | monty@le | 248-675-5 | Hey Mary, my busines | | Mary Wils | mary@mackcomp.co | | Emails | TRUE |
| 4 | Thu Jul 27 16:52:1( | Woody Duprey | wp@bigsk | 704-555-8 | Hi Phil, I ha | Phil and hi | Phil White | phil@mackcomp.com | | Newslette | TRUE |
| 5 | Thu Oct 19 11:34:1 | Megan Johnson | mj@gmail | 248-555-1 | Mary, Plea | You focus | Bob Yohm | bob@mackcomp.con | | Emails | TRUE |
| 6 | Mon Jan 15 14:00: | Andy Duprey | andy@big | 704-555-1 | Hi Phil, giv | Phil and hi | Phil White | phil@mackcomp.con | | Emails | TRUE |
| 7 | Fri Feb 2 13:23:31 | Lucy Brown | lb@lb.net | 219-555-1 | Lucy called in to let u | | Mary Wils | mary@mackcomp.co | | Offline | TRUE |
| 8 | Tue May 22 14:38: | Steve Miller | stevem197 | 419-555-1 | My brothe | You help u | Phil White | phil@mackcomp.com | | Emails | TRUE |

Here is another example using a formal tracking application:

### Alerts

| | | | | | |
|---|---|---|---|---|---|
| All Alerts ▾ | | | ⬇ Download All Alerts | | |

| Date ▼ | Advocate | Owner | Source | Actions | Contacted |
|---|---|---|---|---|---|
| 06-22-18 | ADAMS KEVIN | Phil White | Text | Remove | ☐ |
| 05-22-18 | Steve Miller | Phil White | Emails | Remove | ☑ |
| 02-02-18 | Lucy Brown | Mary Wilson | Offline | Remove | ☑ |
| 01-15-18 | Andy Duprey | Phil White | Emails | Remove | ☑ |

Idea Sheets provide quick and actionable suggestions to drive more referrals and sales. Visit www.referralsafe.com/asktra frequently for new additions.