

Referral Reinforcement Behavior Checklist

Turn every happy client into your next three.

A referral is the highest trust a client hands you. Reward it fast, in the open, and every time. This checklist works for any trade and keeps your referral flywheel spinning so no referrer feels forgotten and no referred client slips through the cracks.

When the referral comes in

- ☐ Tag and source the referral in your CRM. No CRM yet, use a simple spreadsheet. Never let a referral go untracked.
- ☐ Send a handwritten card and a small gift to the referrer the same day, to their workplace when possible.
- ☐ Send a short video text. Thank them by name and promise to take great care of the person they sent.
- ☐ Add the referrer to your CRM if they are not in it.
- ☐ Put the referrer on your ongoing nurture plan so the relationship stays warm between jobs.
- ☐ Tag the record Referral Given and log the exact source.

When the referred client books or buys

- ☐ Run the new client through your standard intake or onboarding so nothing slips.
- ☐ Send the referrer a second video text. Tell them their friend is booked and in good hands.
- ☐ Tag the record Referral Gift Needed.
- ☐ Set a calendar reminder to send a gift when the job completes.

When the job is done

- ☐ Deliver a thank-you gift to the referrer, workplace when possible.
- ☐ Ask your happy client for a review at the peak moment, right after you solve the problem.
- ☐ Ask the same client who else they know who needs you.

Track Two Numbers

Reviews per job: _____

Referrals per client: _____

Pro Tip

What you fail to track, you fail to reward. What you fail to reward stops happening.