



The  
Marketing  
Dojo

# Referral Pipeline Builder

Hi, my name is

# Marty Fisher

Founder of Sherpa Marketing  
and Creator of The Marketing Dojo.

## I help marketing leaders get more referrals from their customers.

Word of mouth and referrals produce the highest-quality leads and if your product/service is holding up its end of the bargain, you'll get some of these without even trying.

That can make you feel like you're doing well.

### **DON'T LET IT!**

If you're not being intentional about getting referrals, you're leaving 10-20% YOY growth on the table.

In this [Referral Pipeline Builder](#), we'll show you exactly how to position yourselves to get more referrals and how to build it into your DNA.

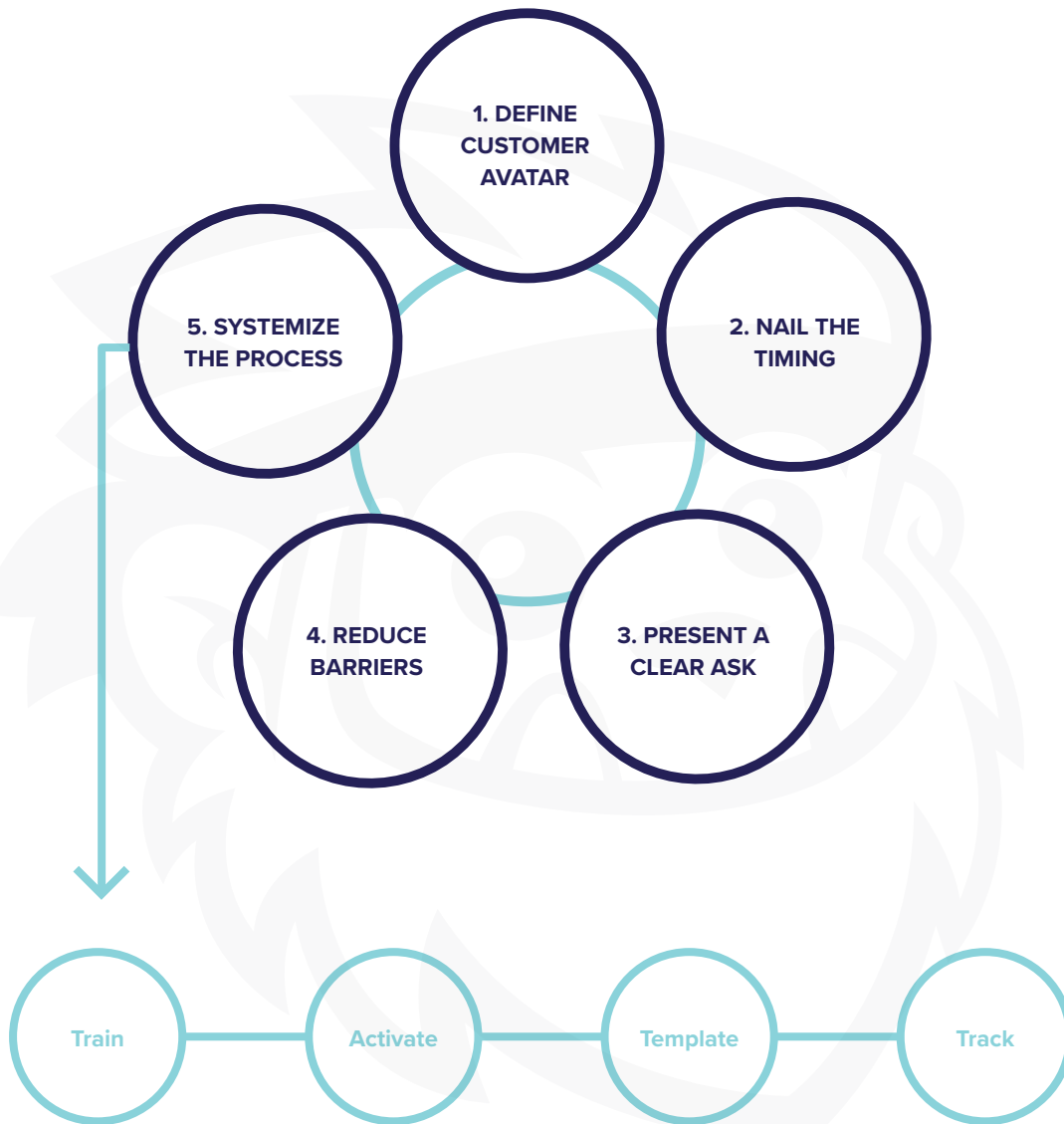
The end result... **4x the number of high-quality referrals you get from your customers.**



# Referral pipeline builder process

Here is the Referral pipeline builder process with all its moving parts. We'll go through each step to help you develop your own referral pipeline.

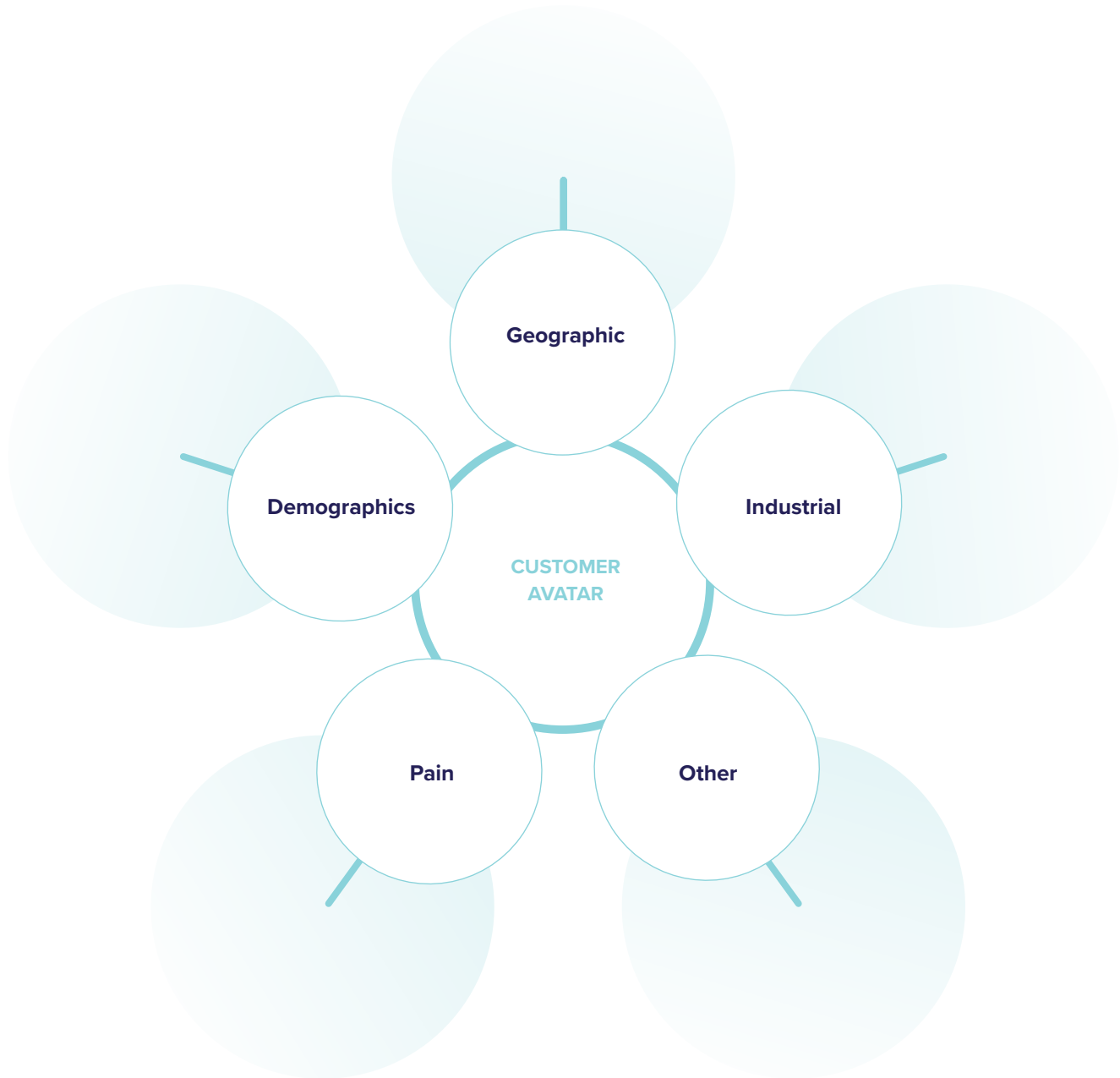
Examples and templates can be found at the end of this document for every step of the process.



# Customer avatar

**i** Instructions:

Start by building a mind map to get clear on your customer avatar. Fill in from the template below or create your own. Get specific. Flip to the end of this document for an example of a completed mind map.



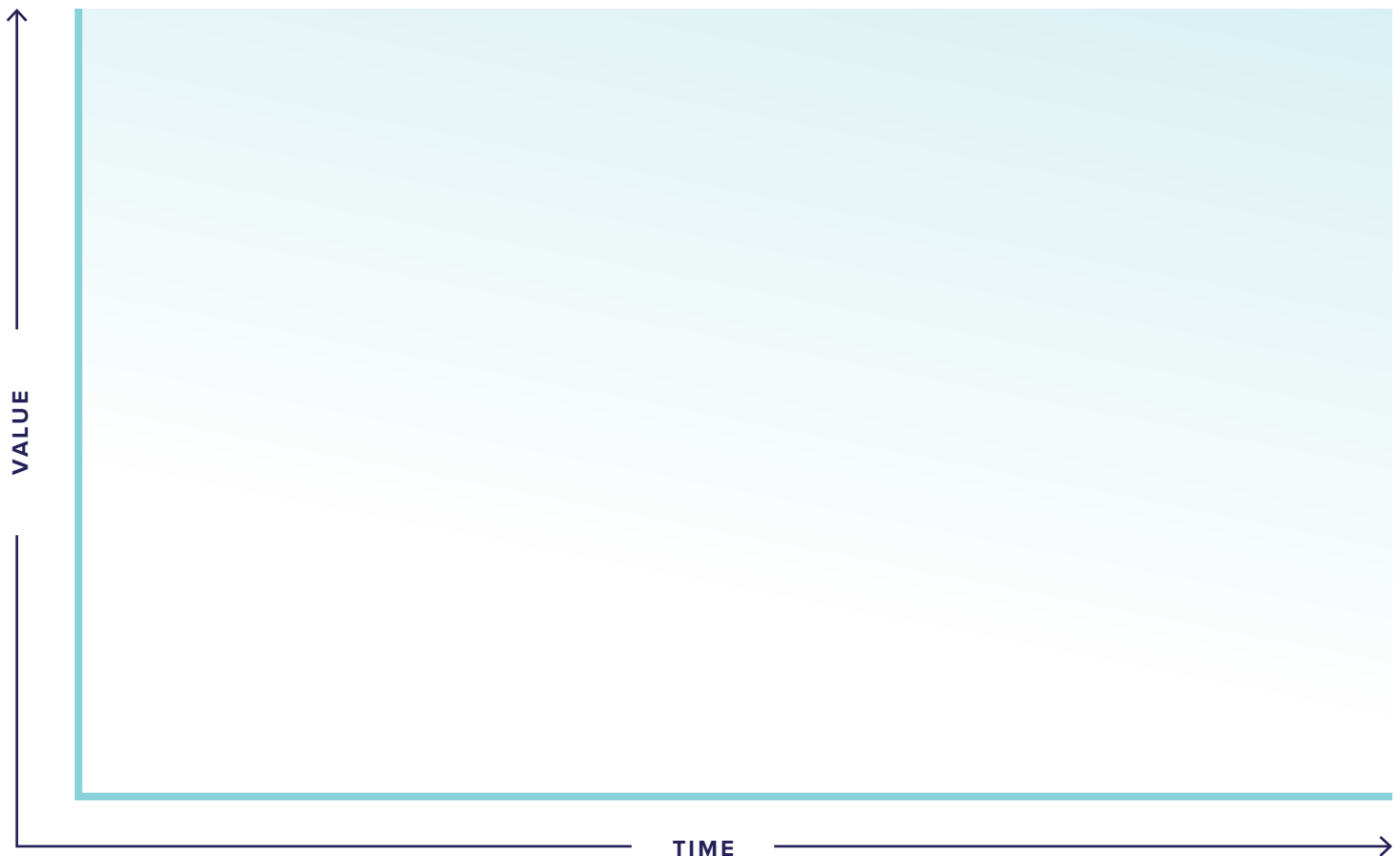
# Nail the timing

## **i** Instructions:

Map out your customer value journey. Map out what your customer lifecycle looks like with all the high and low points in the journey. You want to identify the moments you'll be interacting with your customers and where the high and low points are.

Start with the day someone becomes a customer and anytime there is a 'value-event' map it on the graph to get a sense of where the high points are in your customer lifecycle.

A completed example can be found at the end of this document.

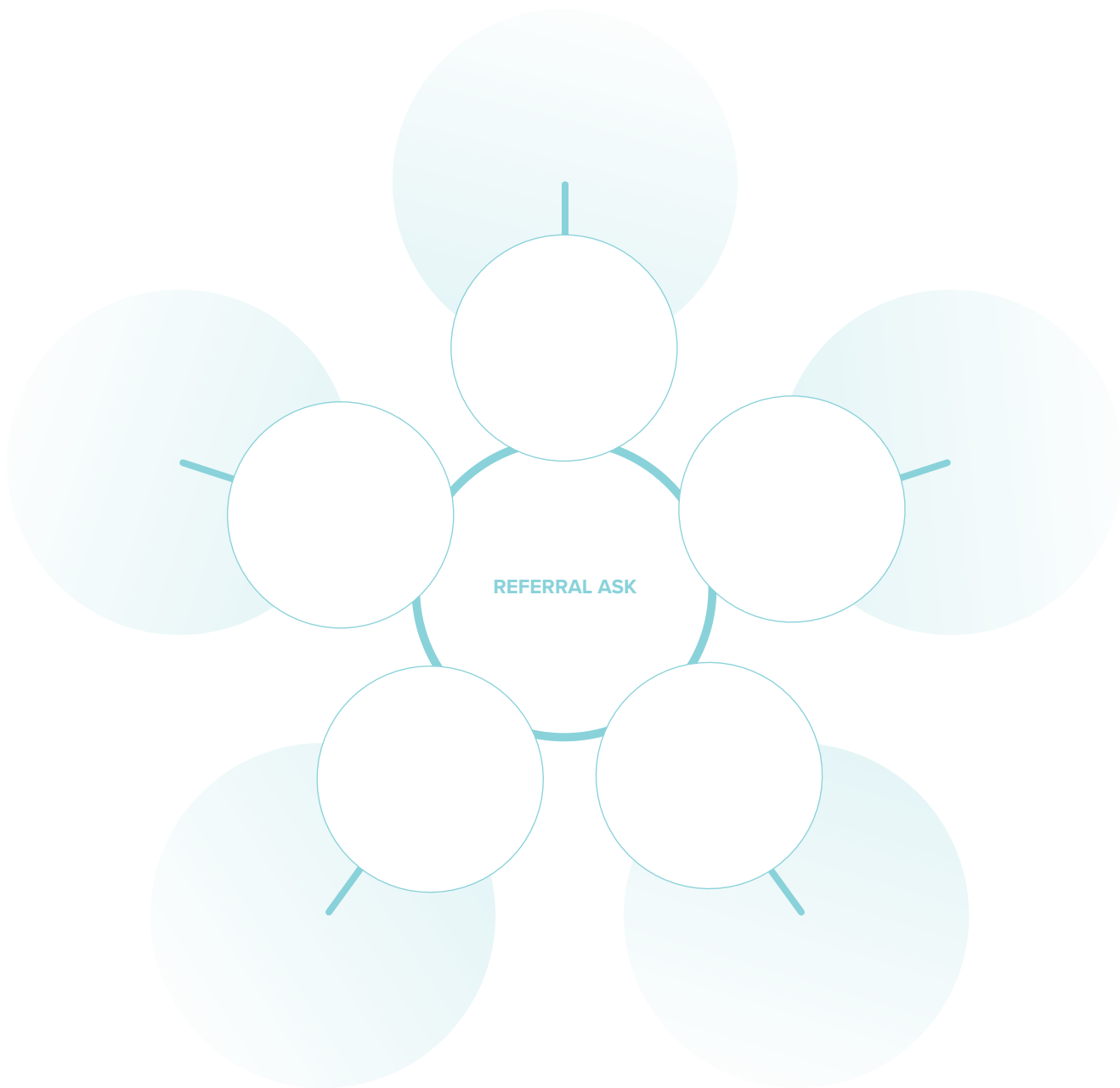


# Present a clear ask

**i** Instructions:

You want to make it easy for your customers to refer your business. What does a referral look like? Brainstorm your own (use a mind map in the space below).

A completed example can be found at the end of this document.



# Reduce barriers

Sure you'll get some referrals if you do great work and provide great service, but you can 10x that by creating a comfortable environment and asking for referrals.

If you have regular meetings with your customers, this step is easy. Just use the meeting as an opportunity to ask for referrals in a low-pressure way. "Hey, is there anyone else you know of that I can help?"

If you don't get these opportunities, you can use email or a phone call for this as well. Don't start the conversation by asking for a referral. If you're sending an email, don't write a long email explaining why you need referrals and what you can do for them. Write a short email asking a simple, easy question. Start a short dialogue.

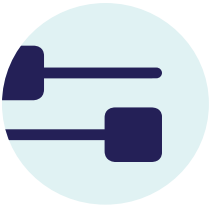
If your clients can't think of anyone to refer, ask them to leave a positive review on Google or Yelp. Why not send an automated text or email shortly after your meeting/call with them asking for a review and providing the link for them.





## TRAIN

Add this process to your training documentation.



## ACTIVATE

Activate your team by integrating this with your CRM, providing reminders and nudges.



## TEMPLATE

Build templates for your customer-facing team to use as a starting point. At the end of this document there are some great templates to get you started!



## TRACK

What doesn't get measured doesn't get done. Track how many referral leads you get each month and each quarter. Set goals and hold your team accountable.



# Phone call template



## START BY WRITING AN UNSOLICITED EMAIL TO A CUSTOMER THAT SAYS:

“Hey, Joe - really appreciate your business and I’m really loving working with you... Do you mind me asking... what’s the thing you like most about our product?”

## THEN FOLLOW IT UP WITH SOMETHING LIKE:

“Joe – really appreciate the feedback. It means a lot to know you’re loving our product. Here’s what I really want to know... are we delivering enough value for you that if the right person came along, you would recommend our product?”

“Joe, I’m over the moon that you feel that way. So glad to hear as I really love working with you as well. Can I ask... what would that “right” person look like that would be a fit for our product in your opinion?”

“Joe – you pretty much summed it up. That’s exactly the kind of person we love working with and really think we can help the same way we helped you. Can I ask... is there anyone specifically that you know that you think fits that description?”

# Email template

Your goal is simple here. Get them thinking and get them to reply. People are creatures of habit. When they start replying to your emails, they will continue replying. If they start ignoring them, they'll continue ignoring them.

Once they reply, acknowledge their response and add value.

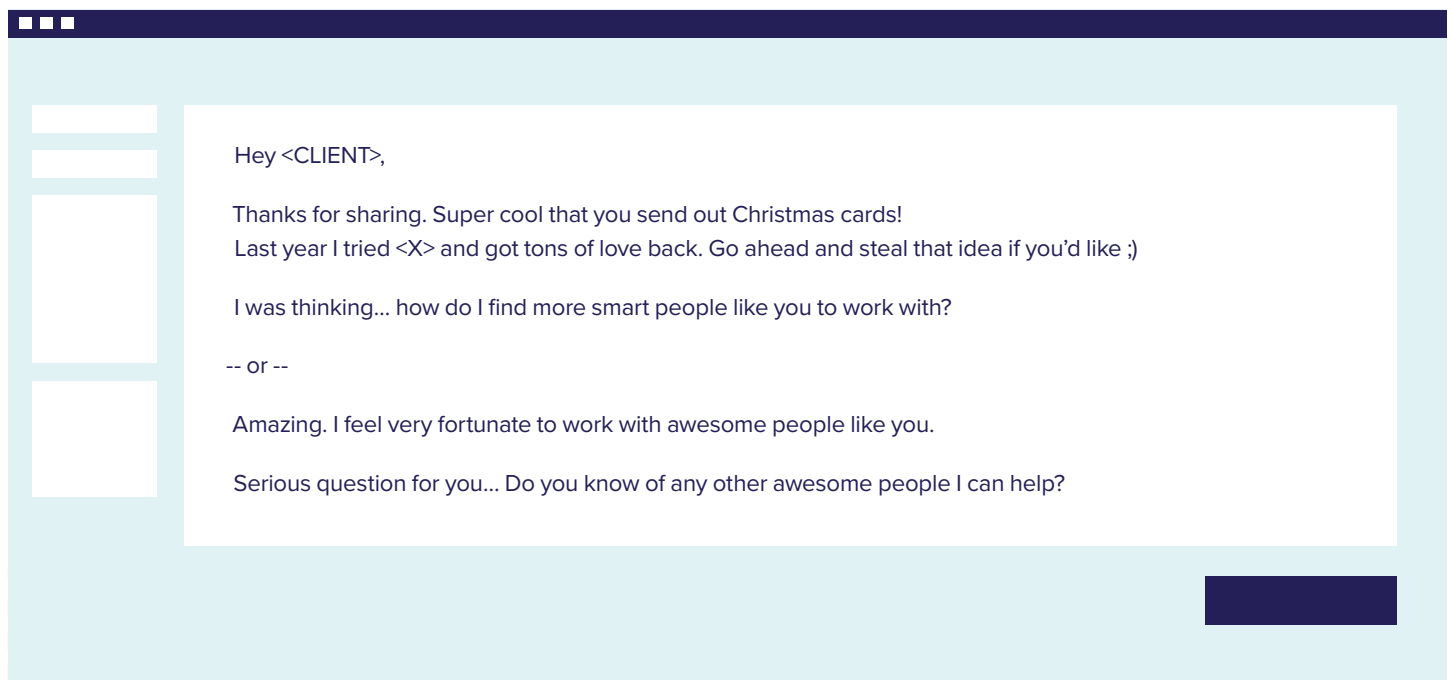
## HERE ARE SOME GOOD SUBJECT LINES:

- Subj: asking for a friend...
- Subj: can I get a one-word answer?
- Subj: working together...
- Subj: Winnipeg
- Subj: priorities?

## AND HERE'S SOME GOOD IDEA STARTERS FOR BODY COPY - ONE LINE. 9 WORDS. SHORT. SEEKING A REPLY.

- Have you ever dealt with <problem>?
- Do you use <X> or <Y>?
- Asking around... do you send your best clients christmas cards?
- One word answer... <question>
- On a scale of 1-10... how was <X> this year for you?

## AND HERE'S HOW TO TRANSITION IT TO ASKING FOR A REFERRAL:



Hey <CLIENT>,

Thanks for sharing. Super cool that you send out Christmas cards!  
Last year I tried <X> and got tons of love back. Go ahead and steal that idea if you'd like ;)

I was thinking... how do I find more smart people like you to work with?

-- or --

Amazing. I feel very fortunate to work with awesome people like you.

Serious question for you... Do you know of any other awesome people I can help?

# Chat/Facebook/LinkedIn message template

Use something like this to finish off a personal conversation or engaged dialog with a customer through chat or messaging app:

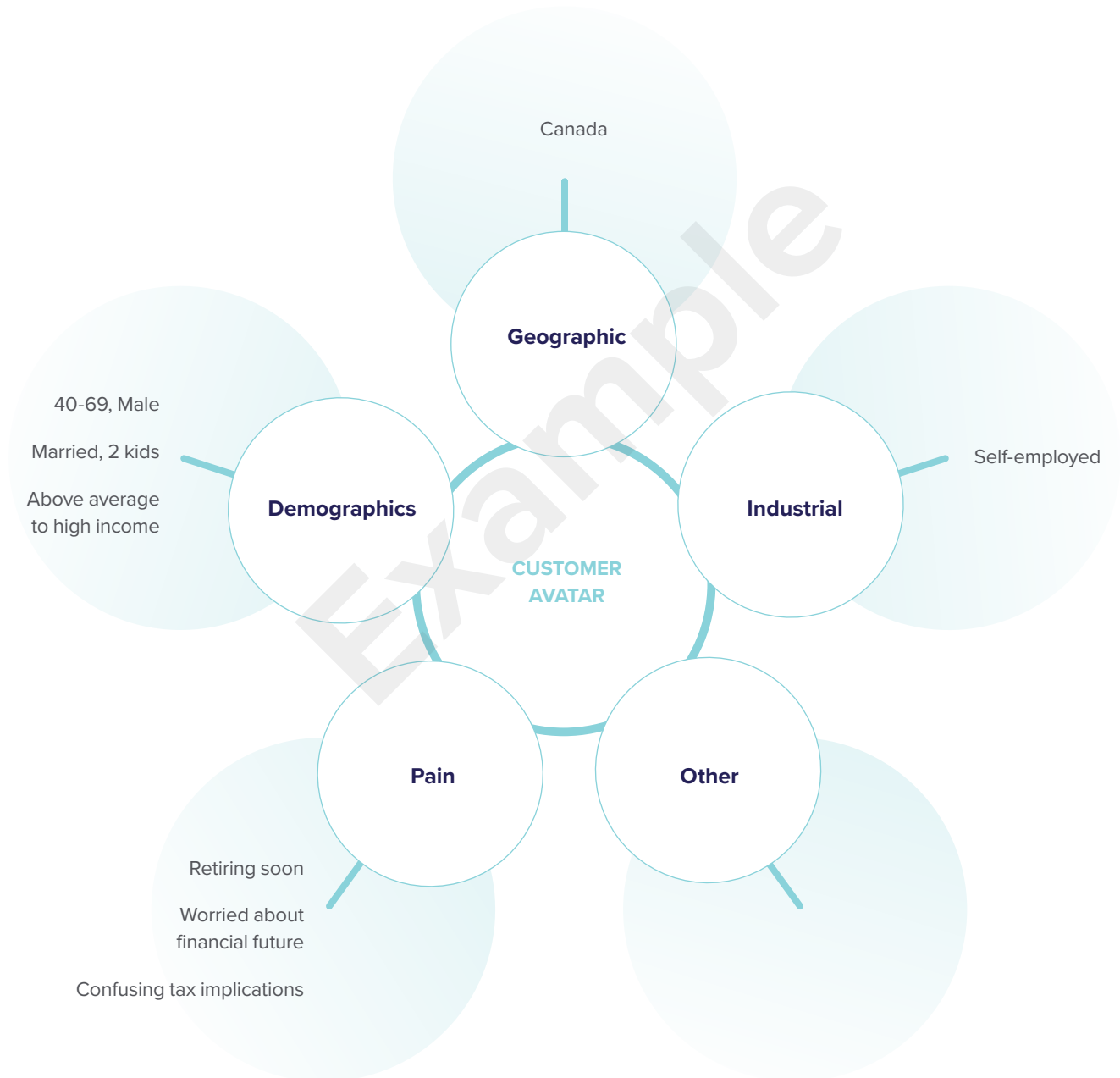
“Look, I love having you as a customer... really appreciate you. I wanted to ask... do you know any other <X> looking to <Y>? If so, just type their name below. I'm going to send you a <GIFT> either way.”

## EXAMPLE:



**i** Instructions:

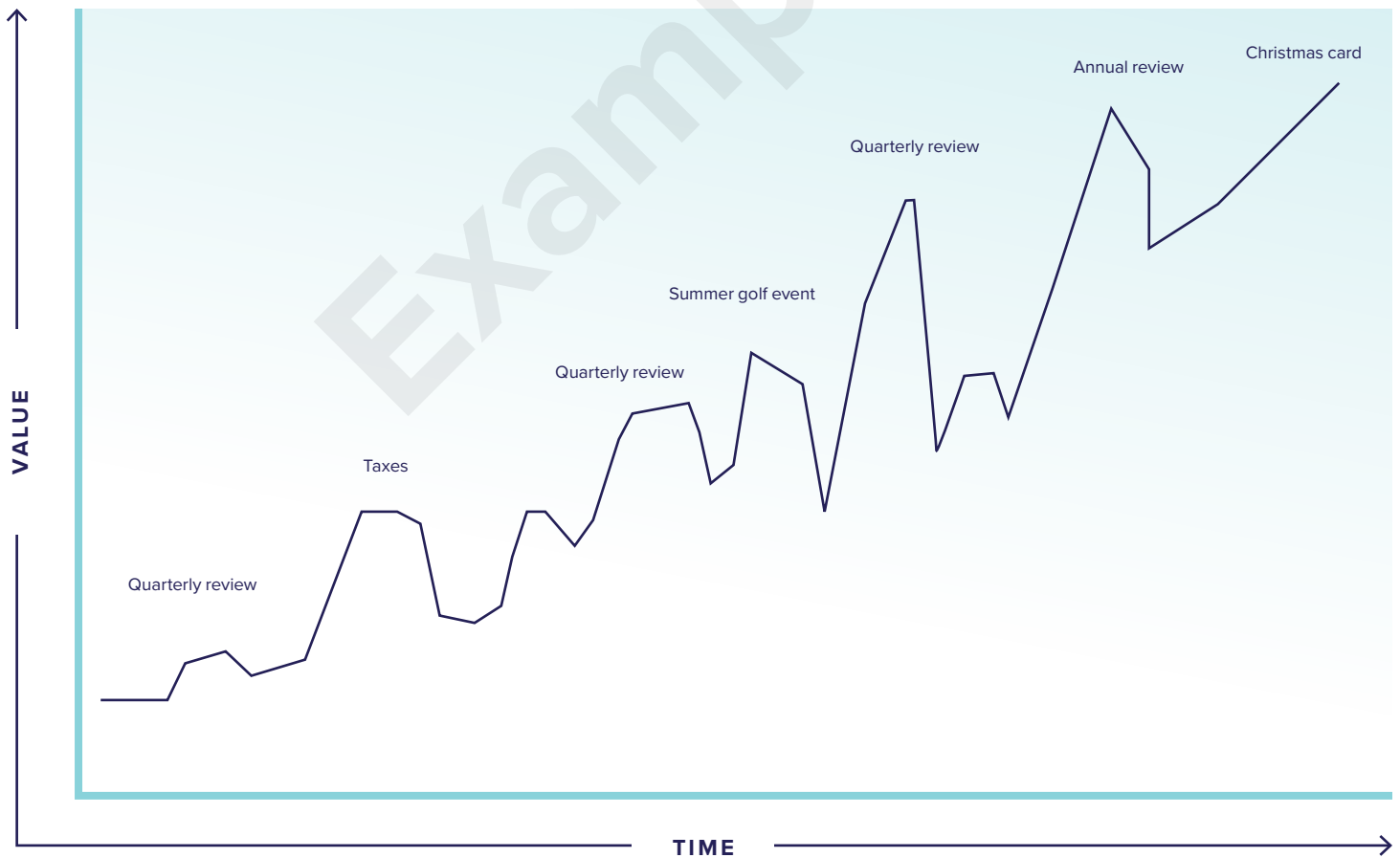
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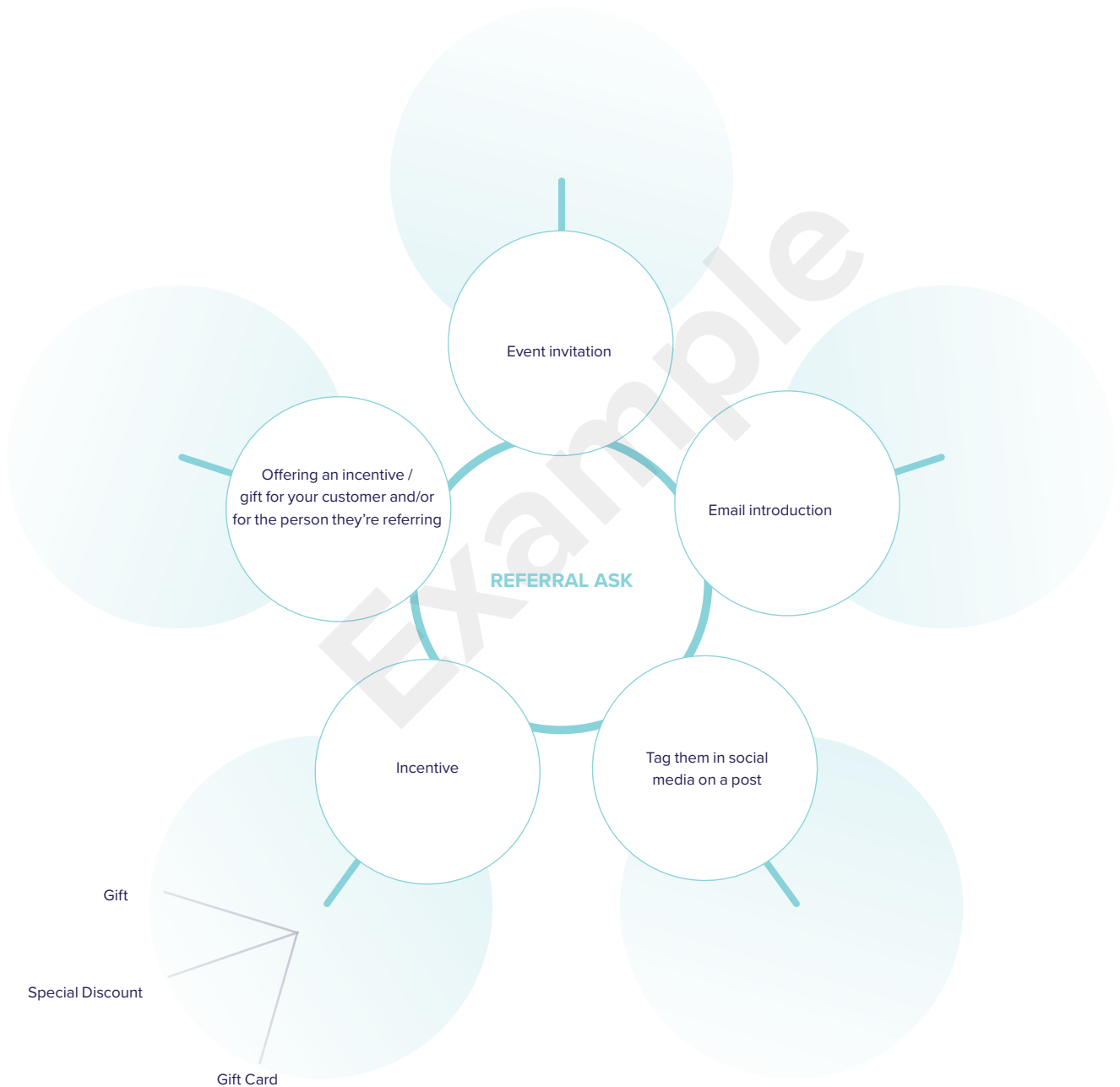
Map out your customer value journey. Map out what your customer lifecycle looks like with all the high and low points in the journey. You want to identify the moments you'll be interacting with your customers and where the high and low points are.

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You want to make it easy for your customers to refer your business. What does a referral look like?  
Brainstorm your own (use a mind map in the space below):



The ROI of filing this away for “future reference” is ZERO.

Nominate someone internally to drive this forward over the next quarter.

If you're a CMO or Marketing Leader and you'd like my help to build your Referral Pipeline... [book a FREE Strategy Session](#) now.

My team or I will hop on a call and figure out the **#1 thing** you need to close the gap.

[BOOK A CALL](#)

[shepamarketing.ca/strategy-session](http://shepamarketing.ca/strategy-session)



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