

DISTRICT32 REFERRALS

Key Aspect	Questions to Ask	Actions to Take
Current level	How comfortable am I with identifying and / or providing referrals?	Consider things from your clients perspective. With a view to being helpful, what questions do you need to consider?
Key takeaway	What are the 3 key things I can change about my meeting planning, preparation and referral identification that I will implement?	Set aside time for an upcoming meeting and plan with a view to understand the customer strategy and need, and identify who in the D32 network may be able to assist.
Client Needs	What are the specific needs of my client?	Identify the products/services that can fulfill the client's needs.
Business Network	Who in my D32 circle offers the products/services my client needs?	Have a 1-to-1 with the relevant businesses / contact in my circle to learn more about their offerings and how they operate.
Expertise	What specific expertise do all the businesses in my circle have?	Identify businesses within the D32 circle that have the relevant expertise for my client's needs.
Reputation	What is the reputation of the business in my network?	Get feedback from other people within the circle to ensure there are no red flags, HOWEVER, assume the positive and not the negative.
Cost	What is the scale of cost of the products/services offered by the business partner in my circle?	Plan and facilitate the discussion with your client regarding their expectation of the cost of the products/services offered by the businesses in my circle is within the client's budget.
Referral process	Am I comfortable with the best way in which to facilitate a referral that I am comfortable to manage?	Identify if in-person, over the phone, virtual or electronic is the best way in which to facilitate the referral
Follow-up	Did the referral result in a successful business interaction and/or transaction?	Follow-up with the client and the D32 member to obtain feedback.
Report	Can I provide a referral opportunity prior to the next circle meeting?	Review upcoming meetings and make a plan.

Client	What is their strategy / goal / objective?	Who would be appropriate to support and how will I initiate / facilitate?
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