

NAVIGATOR

1. WALK	2. RUN	3. FLY
a. Build foundation for new process	a. Identify your client promoters	a. New, actionable content to grow your firm
b. Create Personal Referral Plan*	b. One question survey to drive results	b. Fodder for team learning events like lunch and learns
c. Share Memorable Stories, Faster Connections	c. Share your Personal Survey Link with clients*	c. Consistent additions and updates*
* There is no limit to how many Personal Referral Plans you can create	* It's important to do this. It will help identify happy clients who could be referring but aren't	* Choose just one idea sheet to focus on at a time to increase the effectiveness of learning it

Glossary

KEY TERMS	DESCRIPTION
Actionable Idea Plan	One-page playbook for deploying Actionable Idea projects.
Actionable Ideas	Content to help grow firms.
Memorable Story	Short statement about who benefits the most from your specialized help.
Net Promoter® Score*	One-question survey to measure the willingness of clients to refer.
Personal Survey Link	Unique URL that connects to one-question survey.
Personal Referral Plan	Two-page playbook with personalized Memorable Story for each advisor.
Tip Steps	Sequential sales nudges and suggestions shared with advisors.

*Registered trademark of Satmetrix Systems, Inc., Bain & Company and Fred Reichheld

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