NAVIGATOR

Personal Referral Plan Tips

By now, you've likely become familiar with NAVIGATOR's three phases; RUN, WALK, and FLY. Driving organic growth with a repeatable, simple process is its goal.

Ideas

During the WALK phase, you completed your own Personal Referral Plan. Here are a few suggestions to consider to receive maximum benefit.

1. Refine your plan: You can create as many Personal Referral Plans as you like. Keep creating new ones until you have nailed your specialty, new clients you want to target, and your process for connecting with the referrals who will benefit the most from your help.

2. Have two specialties? Having two segments of clients you can help is common. Maybe pre-retirees from an F50 employer and also professionals in the same industry (veterinarians, for example). It would be wise if you created a Personal Referral Plan for each segment.

3. Keep it handy: Don't merely create your plan and forget about it. It's a critical part of the NAVIGATOR process.

4. Make it durable: After you have a version of your plan, you feel good about, laminate it. If your office doesn't have laminating capabilities, take it to your local office supplies store. Their printing department can do this for you.

5. Roleplay: Have a Personal Referral Plan lunch and learn with your colleagues. Have everyone share their plan with the group, provide feedback and suggestions. Then talk about what your experiences using the plan have been like. Lastly, share your goals for the future of the plan.

6. Practice, practice, practice; Start sharing your plan's memorable story as often as you can. The more you do it, the more comfortable you'll be (and you'll begin to get feedback and questions) when you share it.

Idea Sheets provide quick and actionable suggestions to drive more referrals and introductions. Visit the Navigator website often for new additions.