

The Referral Engine - Learning Objectives and Assessment tasks

No	Module	Learning Objectives	Assessment tasks
1	How to ask clients for referrals	<ol style="list-style-type: none"> 1. Identify the key reasons why you don't receive more referrals 2. Explore the 10 key steps to get more referrals from clients 3. Identify at least 3 actions you can take personally to attract more referrals from clients 	<ol style="list-style-type: none"> 1. Identify the source of all new business over the past 12 months. Include the estimated value of each new project or client (over 3 years). How much of this new business has come from existing clients? 2. Identify your top 5 client referral sources and put in place a plan to engage more proactively with these clients over the next 3 months. 3. With reference to the slide '10 ways to generate client referrals', identify 3 actions that you can take now to encourage more clients to refer prospective clients to you. 4. Document up to 3 SMART actions to implement from this module. Update key actions and measurement criteria. Share with your colleagues and ask for feedback.
2	How to develop external referral partners	<ol style="list-style-type: none"> 1. Understand the key principles of developing external professional relationships with referral partners 2. Put in place your list of current and potential external referrers and develop your action plan 3. Consider the value of formal versus informal referral relationships 	<ol style="list-style-type: none"> 1. Critically review your list of external referral partners. Consider both current and potential value of these relationships to you. Develop specific next actions with timings. 2. Establish an internal process for tracking the value of your external referral relationships. Incorporate a monthly review of these relationships, using peer support or administrative staff to ensure that you stay on track. 3. Initiate a referral briefing meeting with at least one potential or existing external referral partner. Use this meeting to provide an overview of your services and outline your expectations. Ask the other party to do the same. Agree on a regular review process. 4. Document up to 3 SMART business development actions to implement from this module. Update key actions and measurement criteria. Share with your colleagues and ask for feedback.