



#Tell-A-Friend: **Current Client**
(rewards/no rewards)

- Email 1 (Day 0)
- Email 2 (Day 15)
- Email 3 (Day 105)
- Email 4 (Day 195)
- Email 5 (Day 285)

#Tell-A-Friend: **New Client**
(rewards/no rewards)

- Email 1 (Day 0)
- Email 2 (Day 15)
- Email 3 (Day 105)
- Email 4 (Day 195)
- Email 5 (Day 285)

#Tell-A-Friend: **Current Client
Renewed Policy** (rewards/no
rewards)

- Email 1 (Day 0)

#Tell-A-Friend
(rewards/no rewards)
Smart

Other Ideas to Gather Referrals

- Press Release
- Newsletter Article
- Blog/Social Media
- Add Announcement
- Add Referral Program
- Announcements
- Emails/Letters
- Ask for Referrals
- Promote at Events
- Monthly & Yearly

A-Friend Landing Page
(rewards/no rewards) &
form

#Tell-A-Friend Referred
Follow-Up

Task (Immediately): "Send Referred Email"

Task (Day 2): "Send Referred
Follow-Up Email"

#Tell-A-Friend Client Follow-Up
(rewards/no rewards)

Email (Day 0): "Thank You" (to
client for referral)

Task (Day 0): Call Client to Thank for Referral

Article Announcement

Media Announcements

Link to Website

Program
Link to
Business Cards

Follow-ups after Phone Call

Events

Early Drawings