

How to set up a customer referral program.

Conduct research

- Find out if other tax preparation companies are offering referrals and what they include.

Create parameters

- Define the parameters of your referral program.

Build incentives

- Decide if your program is incentivized.
- Plan for how you will fulfill these incentives.

Keep it simplistic

- It should be easy for customers to refer new business your way.

Prepare to receive information

- Make sure you know where you are going to securely keep and organize any referral information you receive.
- Make sure your privacy policy is updated and that you have satisfied any applicable consent requirements for using received information.

Get the word out

- Create social posts about your referral program.
- Advertise about it on your website.
- Email your customers about the program.
- Send a direct mail postcard to your customers.
- Communications regarding the referral program should clearly convey any requirements or conditions related to an incentive.

Extend your referral incentives to others

- Don't just offer incentives to current customers – extend the offer to family and friends.

Create a referral form

- Offer a virtual form that customers can fill out, as well as one they can download, print out, scan, and send back to you.
- Print out copies and have them available for customers when they visit your office.

Employee training

- If your firm has multiple employees, be sure to educate them about the referral program and train them to discuss and market it when face-to-face with customers.
- It is important that the way you present the referral program to customers be on-brand for your business and not come off as pushy. Write a script for employees to follow so they know what to say/write.

You received a referral! Now what?

- Follow up immediately. Always explain who you are and why you are reaching out.
- Create a script for following up, whether you're following up over the phone or in writing, so that each interaction flows smoothly.

Keep records and establish trust

- Keep track of who referred new business to you and mention them when reaching out to the potential customer.
- Promptly thank the customer who made the referral and follow through on any incentives once new business is realized.

Create a plan for continued contact

- Getting the referral is only half the battle. Now you must convert them to a customer and ensure that you keep their business. Make a schedule for staying in touch with all potential new customers.