

Tutorial - How to Get Referrals with Infusionsoft

Summary

Referrals are the easiest leads to close. In a recent article by entrepreneur.com, 34% of referrals move forward with doing business with you. Not only are they high converting leads, but they are free! All you have to do is ask.

Step by Step Checklist:

1) Create the Tag "Gave Referral"

Create the tag "gave referral" so that you will be able to know who has given you referrals and who has not. It will enable you to segment your customers and know who has given them to you in the past.

[Click here to learn how to create Tags](#)

2) Create an Email

Create a broadcast email that is going to be sent out to your customers asking them for referrals. One technique to encourage them to give you referrals is to offer them something in return. For example, if you own a landscaping company, you could offer them a free month of lawn service for their referrals.

[Click here to learn more about the Drag and Drop Email Builder](#)

3) Create the "Thank You" Email

Create a "thank you" email that will be sent to your customers who send you referrals. If you are going to give them something for giving you a referral, be sure to reference that in your email.

4) Create the Note Template

It's time to create the note template. The note template allows you to run several different actions when you assign it to a person record inside of Infusionsoft. You are creating this note template so that when you get a referral back from a customer, you can automatically run some actions. When the note template is used, it will tag the customer as "gave referral", send the "thank you" email, and if you promised to give them a free tree trimming or something of that nature it will assign you a task to complete.

[Click here to learn more about note templates](#)

5) Send the Broadcast to Your Customers

Start your referral campaign and send off your broadcast to your current customers!

[Click here for information on how to send a broadcast](#)