

Build a Referral System

10 Point Checklist

Tom Kelly

Want to gain as much knowledge as possible out of Marketing Speak? Read on below for a **10 point checklist** that gives the next, real steps you can take to elevate your marketing to the next level.



Marketing Speak

HOSTED BY **STEPHAN SPENCER**



“In a business, the simple things, usually free or low-cost, work the best. If you understand these distinctions, you can save time and effort and have a successful business.”

TOM KELLY

10 STEPS YOU CAN TAKE TODAY

Want to step up your marketing game?

Here are 10 steps that can move you closer to your goals – today.

- Create a step-by-step system for onboarding my new clients to ensure a seamless experience. This builds trust and confidence in my consistent delivery for clients.
- Ask for permission to use my referrals. Understand that referrals help grow my business. This also plants the seed for future referrals.
- Protect client reputations so they'll confidently refer me to others. Regularly check in with my clients to confirm that they're satisfied with my work.
- Create power partnerships with non-competing businesses. Partner with complementary businesses in co-marketing to network.
- Use presentations to capture numerous leads. When I present to large groups, I simultaneously share my message with many prospects.
- Collect contact information through text-to-screen tools. This allows me to quickly collect contact information from a large group. Follow up with contacts after my presentation.
- Add my new contacts to my CRM. I can set up automation to engage my contacts through email newsletters, social media, etc.
- Track and optimize my marketing channels. Identify and track all of my lead sources over time—events, partnerships, email, and social media. Analyze the data to double down on the best methods to convert my leads. Systematize processes around top lead-gen weapons.
- Follow a four-step sales process focused on my client's needs. Identify their struggles, create a vision of their success, uncover their obstacles, and position my solution to unlock their goals.
- Thank my referral partners. Express sincere gratitude for partnerships that fuel my business.
- Visit Tom Kelly's [website](#) to work with him, book a complimentary coaching session, and take advantage of his free resource, [The 5 Keys to a Great Referral System](#).