



Accelerating Coach Excellence Bonus Tool:

## **Client Referral Tool**

**How do you grow and maintain your referrals?  
The tools, processes and strategies that David B.  
Peterson and David Goldsmith use to stay in touch  
with former clients and referral sources.**

The key to growing a vital coaching practice is to build a strong referral network. While you have to do A+ work in order to be referred, you also have to have a strategy to make sure that your A+ work generates referrals.

## Approach:

- Make sure to stay top of mind with people you have worked with in the past, so that when they are talking with someone, they remember you as a go-to resource. Even though you have done great work, they won't automatically remember you or be up to date on what kind of work you are doing
- Your strategies are always steeped in real time events that further authentic connection
- Your reach outs never come across as pushy, desperate or as part of a mass outreach
- You look for the right rhythm of connection that is appropriate for this particular client or referral source
- During an engagement, regularly checking in on the progress of the engagement helps the client crystallize the value of the work you are doing
- Your most successful efforts are when you connect personally. It's more time consuming and it's more effective
- When you first receive the referral, make sure that you thank those who referred you regardless of whether the engagement begins
- Make sure to thank those who referred you again during the engagement or at the end
- Communicate to your clients that you grow and build your practice based on referrals and that you welcome them (assuming you do great work for them).

## Your system could involve any of the following:

- Sending a personal note on a client's birthday
- Sending a personal note on the anniversary of the completion of your working relationship
- Following them on LinkedIn, staying on top of milestones in their life and following up with a personal note
- Sending a note when your practice changes, address changes or something significant that would affect how they might refer to you

- Forwarding a resource that might be of interest to them along with a personal note on why you sent it
- Connecting former clients (with permission) with each other when they have mutual needs
- Connection methods appropriate to your unique practice
- Your posts on social media can describe a case you are working on (anonymously) and can include language like: "I was recently referred to a leader by a former client."