Client referrals process & rewards policy

Managers should be actively asking current clients for referrals once they have completed their annual work or if they identify an opportunity while preparing their work:

> "If you know of anyone else that needs help with XXXXXXX, feel free to pass on my number/card"
>
> If a client brings up a 'friend' or 'family member' that is unhappy with their accountant, ask them to give them your card/number/email etc.

It is up to the managers discretion to determine which clients to provide a referral reward to and the amount of the reward, based on the following:

1. Value of new client/s
2. Volume of new clients

Referral register

All referrals need to be added to the client referral register regardless of if a referral reward has been given. This way we can also keep track of clients who give multiple smaller referrals which may then add up to a value warranting a referral reward.

Update the client referral register here = Client referral register.xlsx

Referral reward determined.

If it is determined that a client is eligible to receive a referral reward, contact Marketing (Wendy) to issue a giftpay voucher and provide the following information

1. Client name and email address
2. Message to client – example, you may wish to specifically thank you for their referral of "XYZ client"
3. Amount of voucher
4. Branding for giftpay voucher - Factor1 (Melb) , SDPFactor1. Factor1 (Shep), KP partners
5. Let her know you have updated the client referral register.

Giftpay process (for marketing)