

# REC� Referral Playbook

A step-by-step guide for real estate agents to build a robust referral pipeline using REC� concierge tools.

## 1. Map Your Referral Network

- List existing clients, vendors, and partners
- Categorize by relationship strength and potential referral volume
- Identify gaps and target new referral sources

## 2. Concierge Touchpoint Plan

- Schedule key concierge interactions (e.g., service follow-ups)
- Create automated CRM triggers for post-service check-ins
- Define handoff process between concierge and agent for referrals

## 3. Automated Outreach Templates

- Email scripts for requesting referrals post-closing
- Text message templates for timely follow-ups
- Social media post ideas to encourage referrals

## 4. Incentive Program Structure

- Decide on referral rewards (discounts, gift cards, service credits)
- Set eligibility criteria and tracking methods
- Outline communication plan to promote incentives

## 5. Co-Marketing Partnerships

- Identify complementary local vendors (lenders, contractors)
- Develop joint marketing materials and events
- Establish referral reciprocity agreements

## 6. Tracking & Analytics

- Set up dashboard in REC� CRM to monitor referrals
- Key metrics: referral count, conversion rate, revenue generated
- Monthly review process and optimization plan

## **7. Client Appreciation Events**

- Plan events (home maintenance workshops, holiday gatherings)
- Leverage concierge to coordinate logistics and invitations
- Follow-up strategy to capture referrals from attendees

## **8. Continuous Improvement**

- Solicit feedback from referring partners and clients
- Update playbook quarterly with best practices
- Recognize top referrers and share success stories

*Download this playbook and collaborate with your RECN concierge to turn satisfied clients into a powerful referral engine.*