



**LOCAL AREA  
MARKETING TOOLKIT  
REFERRALS**

## INFORMATION KIT

### REFERRALS

#### CAMPAIGN OVERVIEW

The purpose of a referral campaign is to boost member retention, increase brand awareness and generate positive word of mouth reviews, while also generating new leads – and potential new members!

#### CAMPAIGN OBJECTIVES

- Drive lead generation by engaging new prospective members through our existing member base.
- Boost member retention by offering them the chance to win a prize or incentive, by referring their friends.

#### CAMPAIGN PERIOD

We recommend that clubs have a referral offer / refer a friend campaign always running at all times.

#### REFER A FRIEND TILE IN THE APP

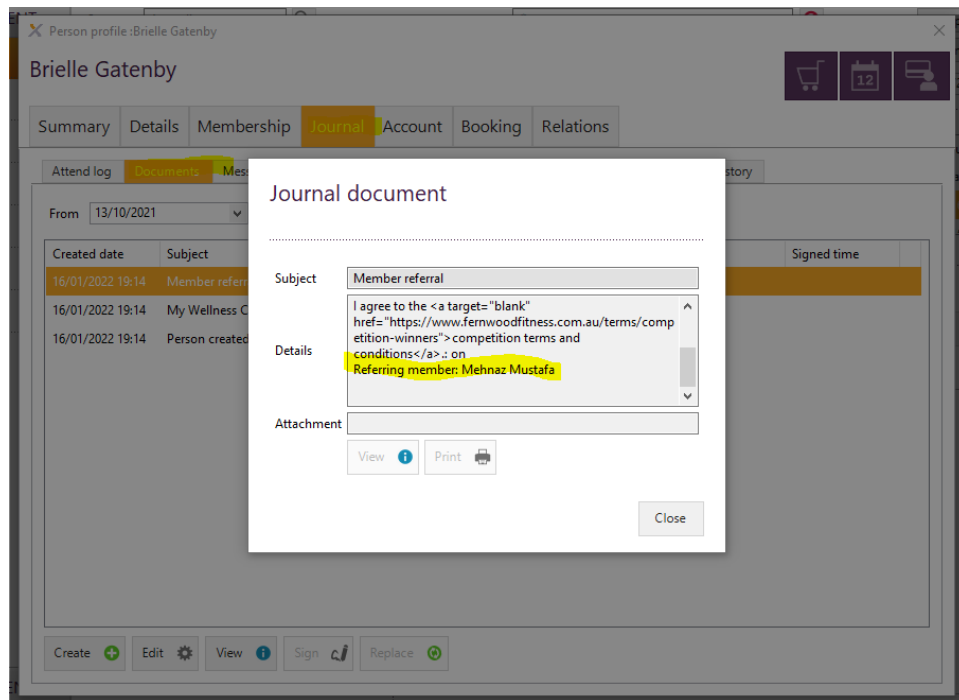
Every three months, the NSO will update the national referral offer that's promoted via the app. When planning any local referral activity, you may like to check what offer is currently being promoted at national level / in the app, so your local referral activity / offer aligns with this too.

Fernwood members can refer their friends to Fernwood by sending them a free class pass. Fernwood members can do this by either:

- Logging into the **Fernwood App** and clicking the 'Refer a Friend' link OR
- Scanning the **QR code** available on the Refer a Friend poster displayed in your club (available to download + print from the National Marketing Campaigns folder on Canva)

The referral lead will appear in your Exerp CRM under the campaign title '**Member Referral - Free Class Pass**'. The journal note against the referral's person profile in Exerp will list the current member's name – which will pull automatically pull from Fernwood Pulse.

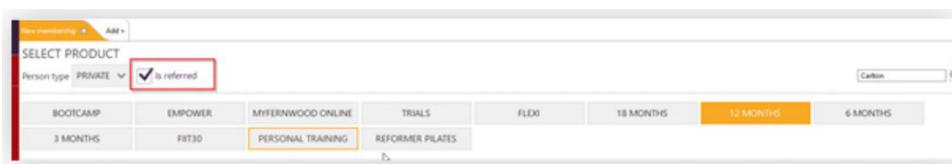
This information will enable you to add the current member details against any friends they have referred. See detailed instructions in next section below. This will qualify your current member for national competition draw (as well as any kind of competition draw you are running locally too)



## ASSIGNING REFERRALS IN EXERP

To ensure that we capture the referring member for any kind of competition draw, we need to use the *Referred By* feature in Exerp when signing up the new member.

1. In the Membership Sale App in Exerp, before selecting membership for the new member, you will need to tick the box *Is Referred*.



2. Select your membership type and proceed to the personal details section of the sign-up.
3. On the Personal Details page, you will notice in the top right corner there is space to enter the existing member that has referred the new member (referee).
4. Search for the existing member by either using the first 3 letters of their first and last name or use the search button to open and Advanced Search in the club.

11 Month Ongoing Add

### PERSONAL DETAILS

Gender ☒ Male ☐ Female

First/last name

Birth date  d/M/yyyy

Age

C/O name

Address 1

Address 2

Postcode   Australia

☐ Use different invoice address

Mobile phone  ☒ Allow SMS

Home phone

E-mail  ☒ Allow service messages

Preferred channel

☐ Email Marketing

☐ Phone Marketing

☐ SMS Marketing

Emergency Contact Name \*

Emergency Contact Number \*

Guardian Name (Members under 18)

Referred by Jenny Day

Who will pay?

☒ Person self (Anonymous)

☐ Search

Payment agreement

☒ Create new agreement

Allow credit on cash account for Anonymous?

☒ Max debit 0.00 \$

How would Anonymous like to pay?

☒ Direct Debit

☐ Credit card

Payment cycle

Payment cycle Big Billing (was FN Both Thursdays, removed even)

Deduction day Thursday (Odd Weeks)

Bank account

Account holder

Bank registration number

Bank account number

Bank name

Bank extra info

5. Once you have entered the referee, complete the sign-up process as per normal.

6. You can later review either member's profile and you will notice in the Relations tab you can see the referred by link and details on the profile.

March Test

Summary Details Membership Journal Account Booking **Relations**

Referred by Jenny Day

Person relations Company relations Transferred and duplicate

Relation type All ☐ Include old

ID	Name	Type	Relation status	From date	To date	Person status
10791524	Jenny Day	My referee	Active	20/01/2021 10:58 AM		Active

By actioning the above, this will qualify your current member for the quarterly national competition draw (as well as any kind of competition draw you are running locally too)

You will be able to track these referrals by using **the Referral Report in Exerp**. This is a great tool if you need to pull a report for a competition draw.



## **COMMUNICATIONS TIPS**

Create a communications plan including when you want to promote the service, your target audience, channels and messaging

- Use TalkBox to create relevant emails to your service offering and club and plan a communications schedule
- Pair this with a social campaign, driving traffic to the lead form: <https://www.fernwoodfitness.com.au/fernwoodchildcare>
- Use copy from the lead form page in your communications via email, social, digital, print etc.
- Consider a paid advertising campaign to promote your childcare service during key promotional periods

Create a communications plan before you start scheduling your communications. Decide on:

- How many emails you are going to send (max 3 emails on the same topic in a short time period)
- When you are going to send the emails (date + time)
- Audience (active members + members on temporary deferral)

There is a standard Fernwood branded template in TalkBox called 2022 Referral April June. This email is complete with the campaign offer (chance to win a 6-month membership), imagery, and link to the referral page with a call to action

Clubs can use this template as desired and make any relevant updates to the copy.

## **SALES TIPS**

- Change your referral campaign monthly. Ideas for referral campaigns include

Instant wins

When you refer your friends or family you receive a water bottle

When you refer your friends and family members today I can take ten dollars off of the onboarding per friend

Longer term opportunity

Refer your friends today and go in the draw to win a ten pack of personal training.

Refer your friends today and go in the draw to win a \$250 dinner voucher from Famous Amis up the road.

Mix up these campaign styles and see what is most appealing to your members.

Once you have a referral campaign in place make sure you use it in several ways

- Point of sale referral "Welcome to the club now let's get you in the draw to win a ten pack of personal training"

- Walk the floor referral “Hi Lisa, how is your work out going today? Are you in the draw to win our ten pack of personal training? Let’s do it now”
- Referral stand
- What’s the goss board
- Post sign up calls “How is your first week at the club? I would love you to bring a training buddy to your next work. Who would you like to nominate?”
- Group Fitness classes “bring your friends next week”
- Email/SMS communication

### Qualifying your leads

Once you receive your leads ask qualifying questions such as

- Who should I call first? Who is going to be most excited about coming in for a complimentary workout?
- Do you know if Lisa or Jody are currently exercising?
- Do they live or work close by?

Once you have set your referral targets, make sure you check out your sales performance report in your Superset dashboard to view your most recent lead to sale conversion.

- What was your lead to sale ratio?
- How can you improve it next month?
- Regular training, urgency of offer and goals, team incentives