



PRACTICE  
MASTERY  
INSTITUTE

# POWER STRATEGIES

Essential Marketing Strategies  
for Extraordinary Practice Success



YOUR MARKETING ALCHEMY **REFERRALS** MANUAL

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What can be said but not practiced...  
is better not said.

What can be practiced but not spoken of...  
is better not done.

[So] ultimately [you] will be able to speak without  
trouble and act without disgrace.

– *Thomas Cleary*



Keep it with faith.

Practice it with keenness.

Perfect it with faithfulness...

then, though the task be great, you shall surely succeed.

— Thomas Cleary



# POWER STRATEGIES



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Essential Marketing Strategies  
for Extraordinary Practice Success



# **POWER STRATEGIES**



## **REFERRALS**



# POWER STRATEGIES: REFERRALS

Referrals marketing, the introduction of a new client to the practice from an existing client, is generally considered the preferred form of marketing in any industry, including the wellness industry. The basis for this preference is the fact that referred clients invariably:

- Cost less to introduce to the practice.
- Are more aligned with the type of client existing in the practice (the law of association: people associate with people like themselves).
- Commit to care more readily and easily.
- Commit to higher levels of care.
- Stay in care for longer.
- Spend more on their care and supplementary elements of practice.
- Are more likely to refer others.

These elements make the referred client one of the most attractive clients you can acquire.

If this is the case, why don't most practices have a referrals program?

Well, most practices will say that they do... *they get referrals all the time!*

There is, of course, a difference between a systematic referrals program that generates a continual stream of new clients and a practice that receives periodic referrals by default.

A practice that receives referrals may do so haphazardly and sporadically, without design or under the guidance or direction of the practice. This is not necessarily a bad thing... however, it is not necessarily an efficient or maximised strategy either.

A masterstroke in referrals is creating a systemised referrals program whereby the practice:

- Actively seeks referrals.
- Consistently seeks referrals.
- Seeks referrals of the highest quality.
- Systematically and reproducibly seeks referrals.
- Seeks referrals from both practitioner and support team alike.
- Generates masses of new clients through the systematic referrals program.
- Has a documented method of creating referrals.
- Has educational material, literature and support materials to facilitate the referrals.
- Rewards the referred client and the referrer to reinforce the behaviour of referring.

What makes this system so powerful is the fact that there is a recognised desire from practitioner, support team and the practice in general to perpetuate referrals within the practice. This is supported by high performance client care (outstanding service and extraordinary care delivered on a consistent and reproducible basis) and significant value and reward to clients for participating in the referrals program.

## **YOUR PERFECT REFERRAL**

In the *Practice Mastery* manual, *Your Perfect Practice*, there is an exercise to take you through defining your perfect practice and your perfect client.

Before you define your referrals program, it is imperative that you move through this program defining what your perfect practice looks like, who your perfect client is and defining them with such clarity that it is unmistakable who it is that you want ideally as your client.

Once you know this, it is time to seek out those existing clients and look to those clients as part of your referrals program.

An active and systematic referrals program provides a deliberate and conscious choice for who you would like to see in your practice. Equally, you should be both deliberate and conscious regarding who it is that you want referred.

As stated, by the law of association, like people will attract like people... and like people will refer like people. As such, focus the systematic application of your referrals program on the existing clients that match the definition of your ideal client.

Starting at this point will build your practice with high quality clients. Then, if you choose, you can apply the referrals program to your other clients and continue to build your practice systematically.

## **FACILITATING REFERRALS**

Many practitioners feel that it is natural for a client to make a referral. This is not always the case. In fact, many clients are uncertain about providing referrals... not because they don't love what you do; not because they don't want to provide referrals; not because they don't think people would benefit from the care that you provide... many clients hold the thought that to provide referrals to an already busy practice is doing them a disservice. They are concerned that because you are already busy, you may not want more clients. Equally, some clients are reluctant to refer because they feel that if you get busy, they won't have the attention they need or the availability for their appointments. Finally, some people simply don't think about it. It just doesn't come to mind that they should refer people, even though they may like to. They know people who may benefit and would in fact refer if asked.

As such, it is important to recognise that to maximise a referrals program it is important that you ask for the referral.

Yes, that's right. Demonstrate your belief in your own care... your willingness to communicate and express the value of the care you provide through asking for a referral.

Marketing is a proactive process, it requires activity on your part and referral marketing is no different.

And you know what's in it for you... more clients!

So, why wouldn't you ask more clients for referrals?

The answer may be:

- You didn't think about doing it.
- You were not comfortable doing it.
- You feel it is an aggressive form of marketing.
- You don't want to be seen as pushy.
- You would rather wait for those who would like to refer to make that referral on their own.

In truth, these are all excuses based on you feeling uncomfortable about any form of marketing activity, in particular those that expose you personally to undertaking some marketing activity... such as asking somebody for a referral!

However, before we address these fears and anxieties, I would like to share with you the reality of how important it is for you to ask for referrals and why it is also a true win for the clients.

Yes, it's not only in your interest for you to grow your practice and have new clients through referrals. It is in the client's best interest that you ask for referrals.

The client has the opportunity to serve their family, friends, colleagues and associates by giving them a recommendation that will improve their health, wellbeing and quality of life... this is a true win for the people they refer in as well as for the client themselves.

A person who helps another person feels good about helping others. They feel good about themselves. The person they refer feels better and demonstrates gratitude, compounding the positive feelings generated by creating a referral. Equally, when they refer another person, they feel good that they're sharing something that they value and appreciate with others and this creates both goodwill in the heart of the client for the referral and deepens the bond and relationship with the person whom they refer.

And, as stated previously, the client also benefits from referral. The client feels good about referring family, friends, colleagues and associates because they feel they are doing something beneficial and worthy for another person. They are sharing something they value with others and this creates positive feelings within the client themselves.

Why would you want to take away these positive feelings from your clients by limiting their ability to refer? Why would you want to prevent their family, friends, colleagues and associates from receiving the benefits of the care you provide by being reluctant to ask for referrals?

Furthermore, it is in the interests of the client because of the benefit it provides to your business... and therefore, the benefit the business provides for them.

We know that in order for your clients to receive the tremendous care they receive, you, the practitioner and the practice itself need to operate and be in existence. If the client had any doubt of your availability to provide their care, they would no doubt be concerned and do whatever it was possible within their means to help you. They truly love, appreciate and benefit from your care and as a result, are loyal to you and supportive of your business, your practice and you.

As such, if a client understands that they are helping you with your business by recommending high quality clients like themselves and creating an environment where they can continue to experience high performance client care... then they would be excited to participate and contribute to that.

By the client contributing to your practice, they are creating a sustainable environment in which they can receive care... this is in their best interest as well as yours.

Furthermore, another benefit exists for the client who refers and for the client who is referred. There are (or at least should be, if part of a systemised referrals program) cost savings with a referral program.

Many practices spend significant marketing dollars on tools and techniques that may be unproductive: Yellow Pages ads, newspaper advertising, flyer drops, etc.

While some of these may be partially effective, the true cost of the marketing (in most practices) has not been calculated. If a practitioner is able to determine the true cost of marketing, they will then realise what it costs for them to bring in a new client to the practice. This may be \$50, \$100 or more for every new client they attract through a marketing endeavour.

A systemised marketing strategy recognises that these marketing dollars are often better spent through the referrals process because it produces higher quality clients. As such, the

astute practitioner recognises that they can spend these marketing dollars on the existing client who makes the referral and the new client who was referred to the practice. In this way, the referring and referred clients win because they are helping you save marketing dollars and those savings are then transferred to their individual benefits, providing greater reward or greater service or care as a direct result of those savings.

As I stated... it is a true win.

- A win for the client.
- A win for the person referred.
- A win for the practitioner... who receives the referral.
- A win for the support team... who continue to have the opportunity to serve clients in a stable work environment.
- A win for the practice... sustainably growing and serving the community at higher and better levels.

Whenever you take the opportunity to incorporate a referrals-based program and educate your clients on the importance and value of referrals within the practice... you are going a long way toward creating not only a sustainable practice, but your perfect practice. Not to mention, a profitable practice, a busy practice and a fun practice to be in!

## **Tools and Techniques of the Referral Strategy**

There are many ways to incorporate a referral system as part of your marketing program.

### **1. Seven Steps to Guaranteed Referrals**

Within the *Practice Mastery* Modules we have a detailed description of a system of scripts associated with the referrals program and the support documentation. This is reproduced in the *Marketing Alchemy Template Manual*.

### **2. Support Team Referrals**

In the *Practice Mastery Support Team Mastery* manual, there is the module, Reinforcing Power Talks, which details the role of a support team in gathering testimonials and referrals. This can be a very important aspect in generating referrals for the practice and maintaining the momentum of a referrals program. This is reproduced in the *Marketing Alchemy Template Manual*.

### **3. Write and Ask**

A more simple way of generating referrals is simply to write a letter to existing clients and ask for referrals. This strategy is both simple and productive, often producing a large number of active referrals from the letter, while re-establishing contact with existing clients, frequently generating more appointments as a result. A sample letter is provided in the *Marketing Alchemy Template Manual*.

#### **4. Rising Above Life's Pain**

There is a marketing brochure titled *Rising Above Life's Pain* within the *Practice Mastery Practice Performance System*. This is used to generate referrals also. The text is reproduced in the *Marketing Alchemy Template Manual* and the mini-manual can be found within the *Practice Performance System*.

#### **5. Referral Price**

In his book, *Instant Leads*, Bradley Sugars provides the following scripts and system for generating referrals:

When a new or existing client is about to pay for their consultation, reception asks the following:

Reception:

“Thanks for choosing Integrated Natural Therapies, and by the way, would you like the referral or non-referral price?”

The majority of clients will be uncertain exactly what this means and will ask for some qualification or differentiation between the two. This gives you the opportunity to continue with the following script:

“Well (Name), we’re aware a lot of our clients come from people telling other people about our care and the services we provide. For that, we reward those who recommend their family, friends, colleagues or associates to us. If you know 2 people who might be interested in receiving care at Integrated Natural Therapies, and you provide their contact details, we will give you the referral price — and that is 20% less.”

Oftentimes, clients will take the opportunity to provide a referral and receive their discount. If not, it begins to plant the seed that you are a referrals-based practice and then further referral techniques used later during their relationship build momentum toward the client making the referrals. This strategy is particularly effective when used during a marketing campaign, such as *referrals month*.

#### **6. Postcards**

It is very effective to have your own referral postcards printed.

On an attractive postcard, with smiling faces of the members of the team on the front, you can communicate on the backside in writing the following:

“We’re aware that many of our clients come from referrals from existing, happy clients . . . that is, happy clients recommending their friends, families and colleagues.”

If you know anyone who is currently in discomfort or pain, have symptoms that are interfering with their quality of life or would simply like to improve their health, energy and vitality... I ask that you give them a call and let them know that we have some special referred new client times available for them.

Thanks (Name) and I look forward to seeing you again soon.

The INT team

P.S. By the way, make sure they mention this postcard so that they can receive their free gift... and tell them to say who sent them so that we can send you a gift also.

**Note:**

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All referral strategies are most effective when they are followed up with additional letters and, in particular, a phone call. This is particularly true with referral postcard mailings.

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## **7. High Performance Client Care**

One way in which you can generate referrals, supporting the referral process when asked and even without asking, is by delivering high performance client care. When you deliver outstanding service and extraordinary care on a consistent and reproducible basis... clients want to tell their family, friends and colleagues about what they have experienced. They truly appreciate and value the care they have received and the service that has taken place. It becomes an important part of their life and a story they like to share with others.

Be mindful of just how important the care and service you provide the client is and make it an integral part of how you work with the clients. Doing so will generate referrals naturally and then, when you use the other systems of the referrals program, you will literally create an avalanche of new clients rushing into your practice.

## **8. Referral Signage**

You can also stimulate thoughts about referrals by having signage for referrals.

For example, if clients are waiting for extended periods in a reception area, have noticeboards with information about the referrals program that is active and the benefits they will receive.

This can also be displayed on a sandwich board on the outside of the practice, such as, 'Taking Referrals Now.'

Equally, in the treatment rooms, strategically placed signage allows clients to be aware of and recognise the important role of referrals and reminds them to take action on their thought of referring others.

## **9. Kids Day**

You can hold a specific event that allows for parents to bring in their families.

For example, our practice has previously held an event called, “Kids day.”

On Kids Day, parents are allowed to bring their children in for a free examination. The examination enables us to have a look at their children, see if there is any attention needed and then, provide a recommendation of care in the event that the findings dictate that there is care needed.

We frequently have had 30 or 40 children come in during a morning session and over 50% of them booking in as new clients.

The purpose is not to provide a one-hour free consultation to these children, but rather to have a simple one page form filled out by the parents before they come, and a quick five minute examination undertaken to determine the needs of the child.

Parents are grateful for the opportunity for you to have a quick look at the child and are equally grateful to have a recommendation if their child has needs.

In this way, parents referring their children enable you to grow a paediatric-based practice and grow your practice numbers rapidly.

## **10. Workshop or Seminar**

By holding an introductory workshop or seminar and making a requirement that people bring a family member, friend or colleague... you provide them the opportunity to bring new members into the practice. These new people at the introductory seminar are given the opportunity to become new clients with an incentive while simultaneously providing gifts to those people who have brought them to the seminar.

## **11. Closed-Door Referrals Days**

In the same way that you can have Kids Days for parents at the practice to bring in their children, you can have a Closed-Door Referrals Day where any existing client of the practice can bring in a family member, friend or colleague to the practice for a similar examination at no charge. Once again, provide them information on whether or not they would benefit from care and give a gift both to the potential new client and to the client for their attendance.

The importance of this Closed-Door Referrals Day is that it provides an opportunity for the existing client to feel as though they were chosen specially because of the relationship that exists and enables the new client to feel comfortable in the environment because they are introduced by their friend.

To make such an event exciting and motivate people to bring along friends, it is important to create a sense of uniqueness and specialness while simultaneously offering gifts and incentives. Providing snacks, drinks and entertainment is an inexpensive way to create a wonderful environment that supports the referrals program.

Make sure you remember to get the names, addresses and phone numbers of every potential new client who attends and provide a follow up letter and phone call to ensure that the special event has a special impact.

## **12. Gift Vouchers**

An additional strategy for creating referrals is to have gift vouchers available for sale in the practice. Publicise these, advertise them via displays and make recommendations verbally at the counter.

When clients begin to become aware and understand gift vouchers and how they can be used to provide health benefits to their family, friends and colleagues... referrals via gift vouchers becomes an effective element of your marketing campaign.

## **13. Client Appreciation Days**

A powerful strategy for building a business, not just through referrals, but by drawing people to your practice is to stage an event... any type of event that clients love to come to, where they enjoy the feeling of community and the surprise package of an evening with the team.

A Client Appreciation Day gives you the opportunity to appreciate and value your clients, to celebrate with them and provide your appreciation to them... and for you to have them invite a friend, and create a referral network as a result of the invitation.

Celebrate your clients with a demonstration of gratitude and appreciation where you give them prizes, you decorate the practice, you send emails and letters and ask your clients to be there...and tell them to bring a friend!

## **14. New Client Parties**

You may even want to have a party every month for new clients that have joined the practice that month.

Choose a night, take them out to dinner or cater for the event. Have prizes, celebrate the successes they've achieved and invite the new client who joined the practice, the client who referred them and any friends that they want to invite. Make it a gala event, make it special and you'll find that people will constantly bombard the practice with new referrals to be part of this exciting event!

For an extra special touch... do a lucky number draw and give a very special gift away!

## **15. VIC Club**

Establish a Very Important Client (VIC) club where the best clients are recognised for their contribution and, in making them VICs, give them gifts, including gift certificates for new clients.

## **16. Symptom Screening**

If the client had a headache, or any other symptom for that matter, and you've been able to help them, ask the client if they know anyone else with that symptom, and, if they do, provide them information, education and a request for a referral to be able to serve that person based on the results that you have achieved with them.

## **17. Holiday Program**

Send a letter with a special promotion whereby during a specific holiday period, existing clients may invite friends, family members and colleagues during that period as part of a referral strategy.

## **18. Strategic Joint Venture Partners and Networks**

Another power method for creating a referrals paved practice is using strategic joint venture partners and your networking skills. These are covered in detail as individual Power Strategies.

## **19. Make Giving Referrals a Condition of Doing Business With You**

To have a referrals-based practice and truly operate from the referrals paradigm, it is necessary within the policy of procedures discussed at the care plan delivery, that you define the fact that referrals are a part of a requirement of their committing to care. In the policies manual you can define that as a requirement of beginning care that each client provides at least two referrals within their first 12 weeks of care and several more throughout the year.

You also make it a requirement that they attend all workshops, and bring a new friend, family member or colleague to each of those workshops.

The premise for making this an aspect of the policy is that we only accept clients via referral into the practice and that for the practice to be sustainable we need to

maintain our referrals. By having a referrals-only practice we can maintain the quality of client and deliver the type of care and service that produces the highest and best outcomes for our clients.

When you communicate in a way that demonstrates that it is in their best interest for the practice to run and operate like this, you can quite comfortably and easily build a referrals-based practice as a result.

**Note:**

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For those who are not comfortable with and would prefer not to use active forms of sales and marketing, referrals and creating a referrals based practice is the best alternative... because it is not through advertising, it is through a relationship!

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## **ELEMENTS OF AN EFFECTIVE REFERRALS PROGRAM**

To ensure that your referrals program is managed effectively and produces high numbers of quality referred clients, it is important to have a system at the foundation for the program. A referrals system includes:

1. A referrals-based philosophy inherent within the practice... for the practice to become a referrals-based practice, every practitioner and support staff member needs to have in their heart the realisation of the importance and value of referrals.
2. A desire to serve... successful referrals-based practices have at their core a service mentality, wanting to achieve the highest and best results for their clients.
3. High performance client care... delivering outstanding service and extraordinary care on a consistent and reproducible basis. Anything less than high performance client care and the consistency it provides leave referrals at the whim of the mood of the practitioner and the mental state of the support staff.
4. Relationships... the client needs to feel as though they have a connection with the practice, the practitioner and the team. There needs to be a deep and meaningful relationship in the mind of the client for them to have sufficient trust to make recommendations to their family, friends and colleagues to become part of the family.
5. Referrals systems... there needs to be certainty to how the referrals process is undertaken. Whether you request referrals, whether you use specific documents and how the system of protocol is carried out determines its success and effectiveness.

6. Educational materials... it is important, if not imperative, that you have sales letters, brochures, gifts, all with the purpose of training, educating the client on the importance of referrals, how to undertake referring clients to the practice and the rewards that they receive.
7. Reinforcement... it is said that you must reinforce behaviour you want it repeated. In that way, as part of the referrals system there needs to be a way of demonstrating your appreciation and gratitude to your clients for the referrals that they have provided and this reinforcement builds momentum towards continuation of that behaviour and formulation of a referrals habit. In essence, the client has to find value in the reward you give them for their referral!
8. Follow up... there needs to be a method of managing your referrals process. Monitoring what takes place, ensuring that the people who refer are acknowledged, that each client is followed up and the appreciation expressed. Giving lip service to the referrals process, suggesting that you will do something when you either have no intention or no system to ensure it is done, leads to a breakdown in the referrals process.
9. Put a sign or a sticker on receipts, products, care plans... of the fact that you are a referrals-based practice and are accepting referrals this month.
10. Establish a referral-based alliance with other associated businesses.
11. Goals... as with other marketing programs, it is important to have goals attached to your referrals program.

How many referrals do you want each week?

How are you going to create those referrals?

Create a goal setting program in association with your referrals program.

12. Quality standards... as part of your scripts, written information and communications with your clients, it is important to define what quality and standards you have for referrals. You don't want poor quality clients referring like-minded, like-behavioured clients and therefore generating the opposite of your perfect referrals based practice.

Instead, focus on having high quality clients refer equally high quality clients who:

- Understand the benefits of wellness care.
- Are aligned with the wellness philosophy.
- Appreciate the care that you deliver.
- Willingly and joyfully invest in their wellness care... by paying on time and being willing to pay the premium.

- Appreciate the relationship is an important element of care and there is joy and fun in the interaction.
- Act on the recommendations and whose lives improve as a result.
- Do not take up unnecessary time and use care as a social service.
- Who want to change, grow and improve their quality of life.
- Are willing to make a lifestyle change.

These are the types of clients you want, these are the types of clients you want referring new clients to you!

**“A referral-generated client normally spends more money, buys more often and is more profitable and loyal than most other categories of business you could go after. And referrals are easy to get. Referrals beget referrals. They are self-perpetuating.”**

– J Abraham, *Getting Everything You Can Out Of All You've Got*

## THE LAW OF CONSISTENCY

Every natural therapies modality is based upon principles and laws. Life itself is based upon universal laws and principles. Marketing is no different.

The marketing law at the foundation of referrals-based marketing is the law of association, which states that you are the average of the five people you spend the most time with.

Put another way, you will have a comparable vocabulary, mindset, success level, income, interests and even dress style, with the five people you spend most of your time with.

How this relates to referrals is, clients who you are currently seeing and who are appreciating and benefiting from your care, have friends who are very much like them. If you have your perfect client as a consistent part of your practice, these people have friends...just like them. This is the law of association.

Build relationships with existing perfect clients and encourage them to bring in their friends and family. And then you have the opportunity, through the law of association, to build the momentum of creating your perfect practice through these referrals.

It is because of this association and this “likeness,” that referrals from existing perfect clients focus less upon price, make earlier and greater commitment to care and have fewer reservations. You are not only leveraging the relationship that exists between the referee and the referrer...you are activating the law of association.

What's more, the law of consistency defines that when a client makes a recommendation to a family member, friend or colleague, in recommending you to somebody else, they have further committed themselves.

This happens because they need to be consistent with their behaviour. If they recommend you to another person, to be consistent with that recommendation, their behaviour needs to be consistent. Also, they need to maintain "face" with their recommendation by remaining consistently in care. In this way, the law of association and the law of consistency underpin a referrals program and virtually guarantee its success if implemented effectively and supported by high performance client care.

## **WHY REFERRALS ARE THE BEST NEW CLIENTS**

1. Most referred clients are pre-qualified... pre-qualified clients are ready to make a commitment to their care based on their existing understanding of the care that you provide due to the relationship they have with the referring party.
2. Higher rate of conversion to wellness care... referred clients invariably have expectations that the care that they receive will be consistent with the person who referred them. If that person is a wellness care client, they will have an expectation of receiving a wellness care program and that their care will be more comprehensive. Thus, your conversion rates with referred clients are higher as there is very little resistance to the wellness care recommendation.
3. Transference of trust... a referred client inherently trusts you more due to the existing relationship they have with the person who referred them. The trust that you have with the referring client is transferred to the referee, and that enables you to have credibility with them and build the relationship earlier and more readily.
4. Reduced price resistance... referred clients have reduced price resistance. The transferred trust that exists and the pre-qualification and expectations that exist, enable them to move towards a commitment more easily and readily, independent of the considerations of price.
5. It is a "feel good" process... referrals are an excellent source of clients because it is a "feel good" process. People feel good giving referrals, people feel good being referred, and the team and practitioners feel good receiving referrals. It is testimony to the quality of work that is done and provides confidence for all people involved.
6. It is a representation of your effectiveness... for a person to refer another friend, family member or colleague, they do so because they are confident with you, the care you deliver and the practice. Confidence comes both from the relationship that exists between the practitioner and the person referring as well as the effectiveness of the

care they have received that warrants the referral. It is for this reason that referrals put you on a high standing with people who they recommend you to. You would not make a recommendation to a friend if you were not confident or certain about the person you were referring your friend, family member or colleague to.

7. Cost-effectiveness... referrals is a highly cost-effective method of marketing.

## THE LAWS OF REFERRAL MARKETING

To be successful at referral marketing, there are several laws that you will need to follow. Fail to honour these laws, and you are likely to experience a reduction, if not a reversal, in the referrals you receive.

1. High performance client care... in order to be deserving of referrals, you need to deliver outstanding service and extraordinary care on a consistent and reproducible basis. Clients need to have an extraordinary experience, they need to get results... then, and only then, will they share your story with their family, friends and colleagues.

Not only that, they need to know that their family, friends and colleagues will receive the same care, the same benefits and have the same potential for results that they have.

2. You must have a referral mentality... you must be communicating referrals in your dialogues with your clients, in your literature and in your support team scripts. You must generally want to create a family atmosphere, an environment where people come together to heal.
3. You must expect referrals... expect that, because you do deliver outstanding service and extraordinary care on a reproducible basis, you will produce powerful, meaningful and life-changing results in the lives of your clients. And, as a result, their story will be so powerful and compelling that they will wish to share it with everyone that they know... and, as a result, you will have an avalanche of new clients via referrals.

But don't just expect to get referrals. You need to create a referrals system.

4. Referrals system... systemise the generation of referrals via a documented and applied system.

The system involves pre-empting referrals with scripts:

- “Is that appointment for you or your whole family?” at the initial phone contact.
- “I see you have brought your family with you,” or, “I notice that you haven’t brought your family with you. You are welcome to bring them next time,” when you introduce yourself to the client at the initial consultation.
- “We are a referrals-based practice and when we achieve extraordinary results with you... which we will... I am going to be asking you for some referrals,” expressed by the practitioner at the initial consultation.
- Client of the month... who has referred the most clients? Put an award on the notice board in the waiting area of your practice.
- Signage in the treating rooms emphasising, “We are a referrals-based practice.”
- Newsletters emphasising the client of the month who has referred the highest number of clients.
- The policies and procedure manual at care plan delivery that cites the importance of referrals.
- The request for referrals with the referrals documentation.
- Referral month... marketing events specifically around referrals.
- The consistent and never-ending reference to the importance of and the desire for referrals.

And how is it that you can compel clients to refer other than outstanding service and extraordinary care?

1. Create compelling referral offers... provide incentives for referrals, give discounts, gifts or gift vouchers to people who refer new clients.
2. Favour the referee... give a gift to the person who your existing client refers. Demonstrate your genuine interest in them and welcome them to the practice.
3. Offer a special referred client pricing system... “Do you want to pay the full price for your care or the special referred price?” Incentivise clients to refer by giving a discounted referral fee.
4. Special concessions... if a client provides multiple referrals, an expression of gratitude is to provide them a special concession, a night out at a restaurant, a special gift, something of significant value to express and demonstrate your appreciation.

5. Gratitude... say thank you for the referrals, this is a must!
6. Give them free care... show your clients how they can receive free care by providing a certain number of referrals.
7. Timing... a key consideration in asking for referrals is asking at the right time. Ask them when they are feeling positive, when they are experiencing benefits, when they are at an emotional high as a result of their experiences.
8. Pre-empt with training... pre-empt referrals by educating and training your clients that you are a referrals-based practice, that you operate via referrals. And that in order for the practice to succeed and serve its community, referrals are an important part of that.
9. Keep it simple... it's important to keep the referrals system easy and understandable. Make sure that clients know what to do, that it is easy for them to give referrals and maybe even fun!

Make it easy by giving them gift vouchers to give to their family, friends and colleagues; provide them with business cards; let them know what to say to clients that they want to refer, that is, provide them scripts; give them a referrals brochure so that they can write down the names of their family, friends and colleagues to make it easier for them to remember who it is that they want to share their story with.

10. Keep on top of the referral tree... is important for you to keep on top of the referral tree, recognising who is referring who, calculating the total number of referrals that a client is providing and rewarding that client appropriately. Also, acknowledge the people who are referring clients and let them know how progress is going with the people they have referred. Equally, acknowledge to the person who referred them, bringing to their awareness your appreciation for the relationship that exists.

## **MAXIMUM ACHIEVEMENT REFERRALS**

As we have already discussed, many practitioners are content to receive referrals by a default process. Now that we have uncovered the importance of systemising the referrals process, the question that we need to ask ourselves is... how far can we take it? How many referrals can we create through a systemised referrals process? How dramatic and powerful an impact can we have on the health of our community through a systemised referrals process?

A successful referrals-based practice has a maximum-achievement referrals attitude... that is, wanting the maximum number of referrals from their clients to serve the community as effectively as possible.

How many referrals is it possible to gain from one client?

Joe Girard, The Guinness Book of World Records' Greatest Salesman, defines The Rule of 52. Girard discovered that the average person has 52 people at their wedding or funeral, implying that the majority of people have 52 people close enough to be within their immediate sphere of influence. As such, the average client has potential to refer as many as 52 other close family or friends that are directly within their sphere of influence. That's at least 52 people who are responsive to communications from this person.

Now you have a goal for the number of referrals from each client... how are you going to achieve that?

Dan Kennedy in his book, *The Ultimate Marketing Plan*, provides a formula for maximising referrals. He calls it the EAR Formula:

**E** stands for Earn... we have to earn our referrals.

**A** stands for Ask... we need to ask for our referrals.

**R** stands for Recognise and Reward... it is important to be appreciative for the referral, and reward the behaviour you want repeated.

## **BEFORE YOU START YOUR REFERRALS PROGRAM**

It is clear that a referrals program is an important and valuable contribution to any marketing campaign and, in fact, the growth and sustainability of any practice.

However, many people fail to prepare themselves appropriately for creating a referrals program.

Unlike many other marketing endeavours, a referrals program requires a higher level of preparation, clarity and a distinct philosophy and a higher level of service to maintain the expected consistency in the follow-up process with your clients.

As such, the following steps must be seriously undertaken before you begin a referrals program:

1. A conscious and deliberate choice to embark upon a referrals-based marketing program... anything less than being conscious and deliberate in embarking on a referrals program leaves to chance the commitment that is necessary to successfully produce the powerful results that a systematic marketing program can achieve. The readiness begins with your conscious and deliberate choice because, unlike any other marketing activities that can work in a haphazard way (for example, simply putting an ad in your local newspaper may generate clients), the referrals-based marketing campaign requires a higher level of attention to detail, systematic processes and reproduced consistency in the follow-up process.

2. A referral philosophy... in order for a referrals program to be successful, before you embark upon creating a referrals-based practice, you need to have a true and real investment in a philosophy that is consistent with your referrals mentality. You need to understand why it is that referrals are an important part of your practice... and the answer is not just because it is a powerful and effective marketing tool.

The philosophical basis for wanting referrals to be part of your practice is that clients draw like clients, and when you have a wellness-based practice with clients who have a predisposition to the wellness philosophy... having a referrals-based program activates those clients drawing more wellness-based clients who have a consistent philosophy with that which you practice into your business. This gives you the greatest opportunity to serve, to have a genuine and compassionate love and care for your clients and to fulfil your service potential as a wellness practitioner.

This philosophy must first exist within you... otherwise you will simply be using referrals as another marketing tool. And that is simply not enough.

3. An active CRM... a CRM, or Client Relationship Management tool, is necessary before you even begin a referrals campaign. In order for you to undertake a referrals campaign, you need to track the names of the people who are coming in, who has referred them, and build a referral tree. You need to be able to monitor how you have responded to each of these people, whether you have furnished them the promised gifts and support and how they are faring on their wellness journey.

Anything less than an active management process with the existing clients creates inconsistency within the referrals program and jeopardises its success and effectiveness.

4. Complete Buy-In... there needs to be complete buy-in from the entire practice to the referrals program. It is not enough for you to understand the value of referrals, to want to serve a likeminded community with the wellness principles... the entire practice needs to buy-in to this philosophy, have a similar commitment and a strong desire to serve.
5. High performance client care... high performance client care is outstanding service and extraordinary care delivered on a consistently reproducible basis. This is the foundation for a successful referrals program. If you are not able to provide outstanding service... clients are unlikely to refer, or to come back if they do refer.

Equally, if you are unable to deliver extraordinary care, producing powerful, meaningful and effective results in the lives of your clients, there is nothing sufficiently impressive to warrant referrals. A referrals-based practice has at its foundation a commitment to high performance client care.

6. Magic moments... inherent within high performance client care is creating the experience of magic moments for your clients. It is these magic moments that create a powerful connection with the client, a sense of value and contribution and moments of transformation. It is these moments that create amazing transformational experiences for the clients. It is these moments that are highly remembered by the client and are one of the promoting factors of the referrals they give.
7. A high energy team... referrals come when people feel cared for, when they feel listened to, and are at the peak of their emotional experience in practice. These peaks are raised higher by, and made more frequent as a result of, the positive feelings they experience and the energy they feel. This happens more often in a high energy practice than in any other practice and is paramount to a successful referrals program.
8. Referral resources... for a successful referrals-based practice to take place, there needs to be resources in place, available for the support team of practitioners to use as part of the referral system.

For example, there needs to be a referrals brochure, scripts that are trained on as part of the referrals process and clear information for the client and practitioners support team alike as to how the referrals system operates and the benefits of the system. In this way, you have the opportunity to train on the referral system and execute it seamlessly... as well as train the client in the system, therefore generating referrals as a result.

9. Appreciation and gratitude... there needs to be not only a philosophy of appreciation and gratitude that exists within the support team and the practitioner for the referrals they receive, it needs to be systemised and documented in such a way that the client recognises your appreciation for what it is they do and are rewarded for it. This is done by sending thank you letters or immediately following up with an unexpected gift. You can give gifts both to the person who is referred to the practice and the referee.
10. Make it a system... for a referrals program to be most effective, it needs to be a systematic process. Everything needs to be documented, everything needs to be detailed in a step-by-step fashion, and everybody needs to be trained on it, continuously. It needs to be implemented, monitored, reassessed and continually improved and enhanced to maximise results. Anything less than a systemised process to your referrals program does not prepare you for the results you are capable of.
11. Advanced strategies... lastly, when things are working well, when you understand the value and benefits of a referrals program and you are committed to the process, you can take things a step further.

You can expand the system to ensure that you have in place powerful and effective referral tools for your clients in order for them to more easily attract referrals to your practice.

You can create events, such as client appreciation banquets or referral parties to demonstrate your appreciation and gratitude while also simultaneously enhancing the referrals that are derived as a result of the system implemented.

12. Ensure that you are ready before you begin the referrals program... that you are committed, that the philosophies are intact and that the systems are in place. Doing so gives you the opportunity to build a referrals-based practice and have the types of clients and the relationships with those clients that bring the greatest joy and satisfaction to practice while at the same time serving the community and changing lives.

## **ADVANCED REFERRAL SYSTEMS**

The *Practice Mastery Module, 7 Steps to Guaranteed Referrals*, introduces succinctly the concept of the INT *Practice Mastery Referrals Program*.

Beyond that, inspired by the Patti Lund referrals-based dental practice, we provide here the following advanced strategies for a referrals-only practice.

The cores of the advanced referrals system are:

- 1. Multiple layers of credentialing before any new referral meets the practitioner.**

The perspective of the majority of new clients entering a natural therapies office is that the clients themselves have some pain or discomfort that the practitioner is going to address or deal with.

These are not the ideal credentials for a client to enter into a wellness practice with.

Notwithstanding the fact that it is not ideal, it is invariably what we experience... at least in the early stages of transformation from a pain-based practice to a wellness-based practice. Later, as you have a significant number of wellness-based clients with a deep, resounding, wellness-based philosophy as part of their lifestyle and care, these clients then refer other likeminded wellness-oriented clients.

Until then, the credential of the majority of clients is that they are focused on pain and wanting a solution for that pain.

Because this reality exists, you need to be prepared to meet this perspective front on and start the paradigm shift early toward the wellness care process.

Furthermore, you have to deal with the client's expectations that they are entering the practice with.

Every client will have a different perspective on what they are expecting. The majority of them are not only coming in expecting their pain to be addressed, but that there may be more pain with a specific treatment, such as the thought that certain chiropractic adjustments may hurt, or that deep tissue massage may hurt or that they may have to go on a restrictive diet. The team needs to recognise that a significant number of the clients are focused upon not what *is*, but what they perceive or predict is going to happen based on their previous experiences, what they have been told and what they are experiencing with the discomfort or pain they are presenting with.

As a result, clients may be expecting you to behave in a certain way, apply treatments via a specific perceived or known methodology and that the consultative process and practitioner-patient relationship will operate under a known paradigm.

This is the perspective the client enters with... it is your responsibility to alter that perspective early, rapidly and completely.

We will talk later about the credentials you will provide... such as those delivered in the orientation and the policy of care.

## **2. Pre-emptive new client orientation with a client relationship manager.**

A new client is introduced to the practice by a pre-emptive new client orientation by the Client Relationship Manager. The Client Relationship Manager may be, in the early stages, the receptionist, office manager, or one of the support staff. Over time, the success of the practice may enable you to have specialised client relationship managers who specialise in and focus purely upon meeting the needs of the client and providing the ongoing service and support.

Until then the focus of the client relationship manager is discussed in the *Support Team Mastery Manual* and in relation to the pre-emptive new client orientation, is as follows:

The Client Relationship Manager (CRM) greets the new client prior to their initial consultation. The Client Relationship Manager is responsible for welcoming the client to the practice, ensuring that all of their paperwork is complete and that they are ready for their initial consultation with the practitioner.

The CRM introduces the client to the practitioner's assistant or does the pre-consultation testing themselves.

The CRM begins the new client's journey by giving them a tour of the practice, introducing them to the resources and the system of care that they will be under, as well as answering any questions they may have.

The outcome of the orientation is the client becomes familiar with the practice, the resources available in the practice, the philosophy of care that the practice utilises and the likely steps that the practitioner will take the client through on their journey towards health and wellbeing.

Most importantly, the CRM creates an initial connection with the client, an empathic bond, and makes the client feel welcome, cared for and nurtured.

The purpose of the client orientation is not only to allow the client to have familiarity with the practice, it is to pre-empt the nature of the relationship that will exist... a wonderful connection between practice and client, practitioner and client and support team and client... as well as a genuine friendship that forms the foundation for the referrals-based practice.

The Client Relationship Manager spends as much time with the new client as is possible, often up to half an hour where she interacts comfortably with the new client, being both friendly and fun. She learns about the client, their career, family and interests. She finds out the client's spouse's name, kids' names and their favourite books, movies and activities.

She finds out some of the client's interests, like favourite foods, drinks or newspapers... records those, and uses those as gifts later in the care.

The CRM also tells the new client that the practitioners are focused purely on serving the clients at the highest and best possible level and this is why we focus on referrals. Because we know that we can only serve a certain number of quality clients and we have become an exclusive practice, serving only a few lucky clients, who we treat as family and friends, based on this model of care.

### **3. The initial consultation, at which pre-tests are done and no treatment is delivered.**

The initial process of the consultation is the pre-consultation testing.

The purpose of this (and the scripts detailing this are in the *10 Phases of Client Care Training Manual*) is to help the client recognise the importance of lifestyle factors in the effect upon their wellness as well as uncover specific information to help the practitioner be more accurate with their diagnostic process and to assess the potential necessity for further testing more accurately.

The consultation itself is where the client meets the practitioner for the first time.

There are multiple purposes inherent within the initial consultation:

1. Creation of a relationship.
2. Detailing the principles and philosophy of the practice.
3. To listen to the client's complaint within the history.
4. To uncover the objective findings which relate to the client's complaint through the examination.
5. To help the client understand the way forward.

First and foremost, within the wellness practice, is the focus of the initial consultation being able to facilitate the relationship.

The practitioner that rushes, provides short, sharp consultation or focuses purely on efficiency and client turnover, does not establish the kind of deep connection necessary for a client's long-term commitment to care. These practices are short-sighted in their focus on client turnover and undermine the opportunity that exists within a wellness-based practice.

Another purpose of the initial consultation is to uncover whether you, as the wellness practitioner, are able to help the new client.

This is an important distinction between perceiving that the initial consultation is to find out what is wrong and to treat the client. Many practitioners treat on the first visit, when oftentimes the client will be far better served by allowing them to understand the philosophy of the practice, then reinforcing the philosophy by not treating on the first visit.

If you treat on the first visit, subconsciously the client knows that your focus is on the pain that the client has.

With wellness care, you demonstrate that the focus is not so much on the pain (although you care about that), it is about understanding the underlying cause and mechanism of the pain and providing care that is appropriate to the underlying cause, not focusing purely upon the pain.

Significantly, the purpose of the initial consultation in the mind of the client is for them to provide information about their condition... which is why you take a thorough history, listen intently and reflect back to them the understanding of what you have heard. Equally, the examination process reveals to the client that you have been able to assess their body for a relationship between what they are feeling and how the body is functioning, providing you the opportunity to demonstrate an understanding

of the condition they have presented with. Invariably, there is the need for further testing, be it x-rays, blood tests, urine tests or otherwise. The purpose of the initial consultation (history and examination) then is to find out enough information to know what the course of treatment will be.

It is my belief that the majority of practitioners at this time may clearly provide a diagnosis and an effective treatment program... but is this in the best interests of the client?

A client who has thorough further testing done as a part of their consultative process then comes to understand that there is more at play in the condition they have presented with.

There is an accumulation of traumas and stresses that have perpetuated their condition. They have ample, objective and observable evidence for what they may have thought was inconsequential or minor. For example, a person who is told that they have degeneration and arthritic changes causing their pain does necessarily perceive that as significant, and it still holds true that a short-term treatment program may still produce the benefits that they desire.

It is not until they get the objective findings, the tangible evidence and the visual picture that an x-ray provides that they can see the extent of the damage, the impact that that damage is having upon them, and they start to piece together an understanding of the cumulative traumas that they have experienced in their life and how that has related to their condition... and the necessity for them to do significant work now and in the future in order to remedy and address that.

In this way, the initial consultation is preparation for the further testing process, the description to the client of the journey that they need to undergo in order to understand exactly what is taking place, and then what will be necessary to resolve the matter.

Finally, the purpose of the consultation is to understand the philosophy and gain permission from the client to move forward based upon that philosophy.

You cannot expect a client, who has come in with a pain focus, and, invariably, a quick-fix mentality... to be satisfied with not being treated on the first visit... unless you educate them, explaining to them your reasoning and rationale and emotionally support them, building hope and excitement for a real resolution for the condition that they have presented with, as opposed to the temporary band-aid that the pain-based model of care provides.

Now, through the entire conversation, the practitioner understands the wants, needs and desires of the client... establishes some goals and goes about achieving them through a more complete and comprehensive consultative process, including further testing, a report of findings and care plan delivery.

#### **4. Qualifying expectations**

During the care plan delivery process there is the need to go through policies and procedures, stating the expectation you have of the client and the expectations the client can have of you.

While this is touched on in the report findings and expanded on in the care plan delivery documentation, for the advanced referral strategies we enhance the scripts and documentation to support the creation of a referrals-based practice.

Practitioner says:

“You can expect that every time you are in consultation with me you will have my undivided attention and focus. I will be doing everything within my power to deliver a treatment that is designed specifically to help you to move in the direction of powerful and permanent healing. To listen carefully to what it is that you say and apply my expertise with understanding to that to get the best and most positive outcomes for you.

You can expect me, having prepared a care plan for you, to deliver each of the elements of that care plan consistently and in an appropriate and effective order.

I designed the care plan with the purpose of addressing your wants, needs and desires... while simultaneously addressing the underlying causes and mechanisms of your condition with the goal of producing powerful and meaningful outcomes for you. We will apply ourselves to this plan, and I will keep you updated on the progress we are making.

You can expect that everything that we do will be in your best interests. In fact, we guarantee it.

If there is any point that you feel you are not being heard or listened to, that the care we are providing is not moving you towards the results that you desire or that we are not focused on your well-being or quality of life, then we do not want to charge you for those appointments. If we appear distracted or lacking in focus, if we are not addressing something that you have raised or do not explain why we are not addressing that with a valid and acceptable reason to you, then please come and let us know, and we will not charge you for that consultation.

It is our commitment to you, our guarantee, that the care that we provide and the service that surrounds that care will be in your highest and best interest and will demonstrate genuine and compassionate care and regard for you, your health and the direction that you want to go.

Also, we are not like other practitioners who separate themselves from their clients, having a professional distance. We truly want to have a meaningful connection and relationship with our clients. We see our clients as our friends and it is our job to serve them, care for them and produce the meaningful health results that we've agreed upon.

To this end, here is my home number and my mobile phone number. Naturally, I would like you to keep this private. However, I would like you to keep it in your

personal contact list in the event that you should need me. You see, I know that there may be times that you will have frustrations about your health and events may happen that might concern you and I want you to know that I am there for you, just as a friend would be there for you, just as a family member would be there for you. There is no professional separation between you and me, although I will treat you with the utmost professional care. There is a relationship that exists and I want you to know that you can call on me at any time, as you would call on a friend.

In return, there are a few things that I would expect of you.

Firstly, I expect that, now that we have defined your care program and the schedule of those appointments, that you will keep all of those appointments. However, I understand that there may be times when events conspire against you and you are not able to keep your appointments. In those situations I will expect that you will do a make-up appointment in the same week for those missed appointments. The purpose of this is to maintain the momentum of the care that we are providing. You see, each consultation builds on the last, and therefore the continued care yields the best and highest results.

Equally, I expect that your consultation fees will be paid for on time, if you elect to pay monthly.

And, finally, since the only source for clients for this practice is referrals... and I will not be able to stay in business without new clients... I expect that each new client who comes into the practice, yourself included, will refer me at least three new clients of equal or better quality than yourself.

You see, I know via the law of association that you are a quality person, because of the referrer that sent you. Equally, I would like you to refer people who are focused on health and wellness when you elect who to refer to our practice.”

This may feel a little odd to deliver as a practitioner... but it is equally odd to hear this as a client. Most clients have always been treated as patients, having a professional distance between them and their practitioner. Equally, the majority of clients have never had to qualify to be a client in a practice before, but that all changes here!

## 5. Remove practice signage

Now that you are creating a wellness-based practice, you want to create a little bit of mystery around the practice itself, and become somewhat of an enigma. Take down all of the signs advertising the practice.

That's right, the purpose of this is to make sure that you are an exclusive practice, unique, and that people cannot walk in off the street. To evidence that you are a referrals-based practice and that the only way to get into the practice is via a referrer.

With the signs gone, you can demonstrate integrity with the referrals-only process.

## 6. Referrals-based plaques and communication messages

There needs to be a back door to the practice that the clients can use. The front door needs to be locked... and, at the front door, there needs to be a plaque:

“Integrated Natural Therapies

The practitioners are in... but they can't see you... unless you have been referred by one of the existing clients.

If you are in severe pain, buzz and we will find another practitioner for you who can help.”

That is how the front door greets people. However, new clients receive a special card that tells them the location of the side door or back door and that only the unique family members who are part of their practice may use this door.

This again emphasises the fact that it is a referrals-based practice, that it is an exclusive practice that only new clients, genuine clients who are interested in their well-being and wellness care are a part of and have entry into.

## **7. Making the practice “home”**

Finally, the client is in the practice, the waiting area... whoops, there is no waiting area, no front reception desk or reception area.

There is a private living room, like you would have with a family. This room has pretty rugs, chairs, a sofa and all the trappings of home.

Alternatively, the client can go to the sanctuary room. A mist-filled room surrounded by a rainforest and rainforest music where they can lie down, rest and relax and enjoy the ambience of the environment as they await their practitioner.

None of this reminds them of a medical practice, or even a natural therapies practice. It is a wonderful, ambient environment. There is gentle music playing and there are beautiful smells.

There are flowers and plants and it is a positive and wonderful environment in which to come and be healed.

The CRM makes you your favourite herbal tea, provides water or some juices. There is a platter of fruit, your favourite newspaper or book in the lounge area... you truly feel like you are at home.

The orientation shows you where the bathroom is, where the kitchen is, and where all of the resources that are available to you are. You are invited to make yourself at home and use any of these as you see fit. Although doing this yourself is not necessary, because the CRM is taking care of it all for you, serving you, getting you what you want and making sure you truly feel at home.

Of course, there is some signage in the toilets and the kitchen area:

“Dear Guest... Please feel free to use the toiletries, they are for you. Please feel free to use any of the food, drinks or other elements of the kitchen... they, too, are for you.

Feel free to read any of the newspapers, books, or change the music as you see fit...this is all for you!”

The consultation rooms are equally focused on providing a comfortable environment and the practitioner is duly focused on you, your health and care, at the time of the consultation.

The CRM greets you once you have come out from the consultation, and continues to direct you appropriately through the next element of your care.

Naturally, when the CRM introduces the new client to the practitioner for the first time, she introduces the client, telling the practitioner all about the client's family, their interests and their hobbies. She introduces the client as a friend, and the practitioner continues the journey of treating that client as a friend.

Those are the seven elements of the advanced referrals program, which continue to be used in conjunction with the 10 phases of client care, as we will demonstrate as we move forward though this module.

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This is a powerful and impressive experience. Most clients will not have ever felt so nurtured or cared for... have ever been made to feel like they are home in a practice environment.

Very few, if any, practices ever go to these extremes to make their clients feel loved, cared for and welcome.

Not only that, most practitioners are uncomfortable asking for referrals. But this system makes it comfortable, creates an environment where asking for referrals is appropriate, acceptable and even fun. You can expect that clients will jump at the opportunity to refer their family and friends due to the experience, let alone the care that they receive. Not only that, the exclusivity of the nature of the practice ensures that everybody wants to be part of this type of experience.

And while people might think you are crazy doing this, the results will speak for themselves. Implement it, one step at a time. You don't have to go out and buy a new practice, just change the signage until you know it is working. Modify the scripts until you can see for yourself the results that you are likely to get.

## **TWO KEY REFERRAL LESSONS**

**Key Referral Lesson One:** Referrals is not merely a way to sustain or grow your practice... it is an indication of how well you are doing! How well you are viewed and trusted by your clients, and how interested your clients are in you.

Referrals are a clear indication that you are providing a valuable service to the community in a form that the client wants, desires or needs.

**Key Referral Lesson Two:** Client Visit Average (CVA) has a very important relationship with your referrals system. If you are seeing 100 clients per week and only seeing one new client, then 99 clients are not referring... and you may have a problem.

While you have excellent retention, one of the key satisfaction and success measures is referrals. It is important to recognise that the number of referrals you are getting represents and is indicative of your success with your clients and as a practitioner.

Let me explain what these two points mean in real terms:

1. The number of referrals you are receiving is a representation of the quality of service that you provide, how you are perceived and the value you deliver.
2. New referrals are a representation of the trust clients feel for you and the significance or the impact on their life, the amount they value that and how that is represented in how they share their story with others. In essence, when clients are referring their family members and friends, they, in part, are saying, "I want to bring my family and friends into this office because of the significant value and impact you've had on my life!"
3. Referrals are an indication and representation of your service to the community. If you have a low level of referrals, your impact on your community is less significant than if you have a high referral basis. The more referrals you are receiving, the greater your impact on your community and the more you are fulfilling your purpose in practice.
4. A high referral practice indicates your understanding, and your effective education of clients, of the wellness principles. The more people who understand the wellness principles, the more you'll magnify the impact you're having on your community.
5. Referrals are a representation of the entire practice's systems, attitude and philosophy towards full family wellness care. All of the team, support staff and practitioners alike, if they are representative of this philosophy, will be building a referrals-based practice. The absence of referrals indicates the absence of these systems, attitudes and behaviours. You owe it to yourself, your team and your clients... to be a referrals-based practice.

## **THE FINAL LAW OF REFERRALS MARKETING... EARN THE REFERRAL BEFORE YOU ASK FOR IT!**

It is as simple as that.

In the *Persuasion Manual*, you will find the law of obligation... this relates very effectively to the referral system. When you provide such outstanding care and extraordinary service, you create within the client an obligation.

When you give of yourself freely, lovingly and caringly, you add significant value to their life and the lives of their friend and family and this creates an undischarged emotional debt.

They feel so much better, you have impacted their life and the lives of those they care for... you have earned the right to ask for a referral, and when you do there is an unconscious obligation the client has to you for the service and care you have provided.

**Note:**

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It is worth repeating... the success of your practice in the next 12 months equals the number of referrals per client.

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It shows how much each of your clients:

1. Believe in you.
2. Believe in your care.
3. Believe in the principles and philosophy of your health care.
4. Believe in the vision you have for your practice being a powerful force in the community.
5. Have bought in to the wellness family philosophy of care.
6. Have bought in to the nature of your referrals-based practice.
7. Trust you and your care.
8. Appreciate and value your care.
9. Believe that your care will be beneficial and valuable to others.

Make sure you are educating your clients in each of these elements as part of your referrals marketing campaign!

## THE 3 P'S OF A REFERRED CLIENT

1. Pre-qualified... referred clients are pre-qualified by virtue of the fact that they know what it is that you do via the recommendation they have received and have elected to have care. In this way, they have qualified themselves as a client for you even before you have seen them.
2. Pre-empted... they have been approached by a colleague, a friend or a family member who sees you, who knows what it is that you do and why it is that you do it. As such, they are prepared for the care that they will receive when they come to you as a client.
3. Predisposed... because they have been referred by a friend, a colleague or a family member, someone that they trust or believe in, that relationship is leveraged and transferred to you, enhancing your status with them, increasing your credibility and providing the foundation for a relationship.

As such, they are already predisposed to making a commitment to the recommendations you are providing.

There is a fourth P... Potential. They have the greatest potential of becoming a wellness client via the association. If a wellness client is recommending a friend, family member or colleague, they have already pre-qualified, pre-empted the care they will receive, and as such, they are predisposed to making a decision to becoming the wellness client themselves!

## THE WIN-WIN-WIN REFERRAL PROGRAM

The Win-Win-Win Referral Program emphasises the win that all parties receive as a result of referring:

1. The person who gave the referral wins... they are rendering a service for their friends, family or colleagues when they make the recommendation. They are providing an opportunity for these people to receive the benefits of your care. They will feel positive about themselves being able to help others... and this is a good thing.
2. The person who is referred in to the care wins... by virtue of the fact that they have been referred to the practice, they have the opportunity to receive the benefits of wellness care, and this has a tremendous and profound impact on their health, their quality of life and their opportunity to reach their potential. This is a true win for a new client.
3. The practice wins... there are really three parts to this:
  - i. The support staff has a win... having referred clients is evidence that they are doing a good job, they are having a positive influence on people and people are grateful and making recommendations. This makes their job more fulfilling.
  - ii. Equally, the clients who are referred are invariably, because of the existing relationship, easier to get along with, making the job more enjoyable, more fun and more of a community feel. This makes for a great place to work!
  - iii. The practitioner has a win... the practitioner feels positive about being able to help more clients, receive positive feedback from an existing client by way of a referral, and sees that they are doing a positive job.
  - iv. The practice wins... the practice becomes more sustainable, profitable, and therefore becomes an environment that is not only sustainable, but a great place for clients to come to and people to work in.

Referrals allow you to see more clients and provide you with...

- More opportunities to serve and aid the community.
- More opportunities to provide transformational health benefits and results.
- More opportunities to influence your community.
- More scope to increase and grow the practice.
- More opportunity to be profitable.
- And with that profit, more opportunity to serve your clients more deeply.

And the cycle continues!

## **MORE REFERRALS-BASED STIMULATION QUESTIONS**

Did you get any particular improvements or benefits from the consultation? What would you say was the greatest benefit or result achieved through or at INT?

Were there any other problems at other practices that you didn't encounter here that enabled INT to serve you far better?

What level of satisfaction did you gain with your consultation or the products that you received?

What was your impression of our model of health and philosophy compared to other practices or practitioners?

Did you feel listened to, understood, accepted, supported and encouraged?

Did you feel that these attributes benefited your care?

What value do you place on the benefits that you have received from your time with Integrated Natural Therapies?

What benefit/result/outcome did you expect to receive by coming to Integrated Natural Therapies and what benefit/result/outcome did you actually receive?

Will you continue to attend Integrated Natural Therapies after this time? If so, why?

Can you comment on whether you felt Integrated Natural Therapies was professional, polite, courteous and caring?

Did you feel listened to, cared for and respected? Please comment...

Do you now believe that there is some hope, and hold the belief that healing and positive change is possible?

Do you now have, or are you involved in, setting goals and strategies for your own personal development and health?

Did the literature or resources at the clinic, or the educational material provided, seem beneficial and helpful? And what have you achieved because of it?

What was the environment of Integrated Natural Therapies like? Did you feel it was a special place that provided a great atmosphere, a great energy or family-like environment?

These questions facilitate a testimonial and provide an opportunity to influence other people in making a positive choice about accepting care at Integrated Natural Therapies.

## A REFERRALS LOG

Another point that I would like to make with regards the referrals process is that you should create a referrals log, a table that records how many people you ask for referrals, referrals you receive, and your follow-up actions in respect to the potential new clients.

Creating a system of accountability ensures that each week you can review the goals you have set and the actions you have taken in endeavouring to achieve those targets.

## ONE LAST POINT ON REFERRALS

It is important to remember when we talk about referrals that, if a client comes in to see you, they receive benefit because of the treatment that you provide, the care that you deliver or the work that you do with them... you bond as a result of this work, you bond with them in a special way:

- They trust you.
- They respect you.
- They value their health improvements as a result of the care that you have delivered.
- They look to you for advice.
- They look to you for direction.
- They look to you for relief.
- They look to you for health.

Because of this, you have become like a valued and dear friend to them. And, if you are operating from the benevolent place of genuine service and care for your client, they are a valued and true friend to you.

And a valued and dear friend could never let one another down, or give them less than the highest and best possible outcome in the service and contribution you make to them.

A valued and true friend could never knowingly allow anyone who they care for or that is important to them to go and get a lesser outcome or benefit in their life than is possible.

This is the premise for why you deliver high performance client care.

Equally, this is the basis for why it is that referrals are such an important part of practice.

If every one of your clients is a true and dear friend to you and as a result you deliver the highest standard of care available to them because of that genuine care and interest in their life, it is true also that these people have true and dear friends and family members who are important and meaningful to them, and they too should be making recommendations, as a true friend would, for the improvement of their health and quality of life.

When the client understands the benevolent, service-oriented place of care that you come from, when they understand the significant value and benefits of the care that you deliver in their health and their quality of life... they will want those same results for their friends, for their families and thus with understanding, with education and with an increase in awareness, will open up their referral mindset.

However, it takes you becoming aware of this first, and then being willing to educate the clients, reinforce that education and ask clients to make recommendations for referrals based on that philosophy.

Anything less than this is a disservice to your clients.

This system of referrals looks like this:

- Focus on your client.
- Focus on results for your client.
- Focus on referrals from that satisfied client.

Here are a couple of suggestions to increase referrals:

1. Ask.
2. Family member referral cards.
3. Cue cards... these are placed on a client file to remind the practitioner to ask for referrals.
4. Topic of the day... results of no care; who do you know who has this [symptom].
5. Referral month.

6. Collecting client contact names and details and following up based on referral request.
7. Introductory consultations.
8. Introductory seminars.
9. Seminars and workshops where clients are required to bring along a friend who is not an existing client of the practice.
10. Acknowledge and reward referrals when they do occur.
11. If you have someone that you care for who you value... you owe it them to make an appointment with our practitioner."
12. Line openers... when a client shows signs they are having an improvement, such as feeling better, use the line opener as an opportunity to ask for referrals:

**"I'm feeling better now..."**

This leads to...

**"I help a lot of people like this... and I'm glad that you've had these benefits. Because my business operates on a referral basis, is there anyone that you might know who could benefit from this care?"**

Listen, record their names.

**"Is there anyone else you know with this problem... we'd be glad to help them."**

Once you have the names, follow-up.

Spreadsheet of client and referral names...

| Total number of new clients this week | Total number of new clients last week | Percentage improvement | Client name | Purpose of care | Suggested action | By who | Action follow-up | Referral source | Letter 1 sent | Letter 2 sent | Etc. | What are your ideas? |
|---------------------------------------|---------------------------------------|------------------------|-------------|-----------------|------------------|--------|------------------|-----------------|---------------|---------------|------|----------------------|
|                                       |                                       |                        |             |                 |                  |        |                  |                 |               |               |      |                      |
|                                       |                                       |                        |             |                 |                  |        |                  |                 |               |               |      |                      |

Follow-up with letters, gifts or whatever is required to make contact and build the relationship.

Now record how many of these letters were delivered, how many were redeemed and how many converted to care and translate to an ongoing client.

What is the average size of each case and therefore calculate the effectiveness of this marketing methodology.

## RULES FOR SUCCESS FOR IMPLEMENTING A REFERRALS SYSTEM

1. Train your staff to use the system.
2. Integrate it into practice by all of the team.
3. Consistent usage [on a daily basis].

Another system idea for referrals... create a plaque that says that you are a referral-based practice and that initial consultation fees for referrals from existing clients are waived.

All other people will be expected to pay their initial consultation fee.

Referral script:

“Are you mad at me?”

And if they say, “No, why?”

“Well, you haven’t referred any new clients to me lately. Haven’t we helped you?”

“Who can we help in your family, friends, of your colleagues or at sport?”

Include referral requests in your newsletters, in your brochures, on flyers. Write a case history that demonstrates that the person was referred in and benefited as a result of the referral.

Provide a spotter’s fee... \$50 for a new client to diminish your marketing costs in generation of those new clients.

Do a new client event such as a seminar.

The key is that you create a referral mindset. That you become referral-focused and you institutionalise referrals as a part of the cultural phenomena of the practice.

Finally, always saying “Thank you” and an appreciation gift for all referrals you receive.

Another cool script:

Client: “You’re busy...”

Practitioner: “Yes, I am. You know, I get a lot of great clients like you and they’re constantly sending in their family and friends to receive the benefits of care. Who are you thinking about sending in?”

The key is to plant the referral seed and to never stop looking for new clients or referral opportunities.

Referrals are so important because the greatest leverage that you have in your business is the client who has already benefited from the care, enjoys the care that you provide, whether active or inactive, as long as you have rendered them a valuable and meaningful service. Be strategic and proactive in relation to referrals and structure them into your relationship with your clients.

With every letter you send, have a message on the back that you are a referrals-based practice, that you speak to groups, offices about wellness care and provide them the opportunity to book you for a program.

Another idea is the “care enough to share” program... when you have helped someone, provide them with a card that says that you care enough to share, and provide them the opportunity to refer for a screening.

You can also ask your vendors for referrals. Or you can ask your vendors for help with referrals because it is in their best interest that you grow as a practice and see if they have any suggestions, ideas or methods for increasing and improving your business.

## **STILL MORE ON REFERRALS**

Here are some more ideas on referrals.

Advise clients of the case of the week, demonstrating the results that have been able to be achieved and how people they know with those conditions can be referred in.

Advise clients of your specialisation or niche and that you are accepting clients in those areas.

Referrals are perhaps one of the most benevolent acts you can do. It is the highest form of service.

Consider this... you discover that one of your closest friends or a family member has a friend who needs to renovate their house.

It is not a want... it is a true and real need. The house is in a state of disrepair. It is becoming not only uncomfortable to live in but dangerous. They are looking to do this renovation but know nothing about building, renovation, how to contract trades people or get materials. You hear that they are about to make a decision, and because you know a lot about renovating and building, you've had a lot of experience in the area, you notice the quote seems outlandishly expensive.

Because you care about this friend or family member, you inquire further. As you inquire further, you see that the quote is not only a very high quote, it is ridiculously high. It doesn't cover half the work that is necessary and, because you know a lot about the industry, you know that the person that they're looking to contract in to do the job has a reputation for shoddy work and not always completing the work that they begin, leaving the homeowners in an uncomfortable position.

What would you do in this situation? What would you do if you were in the type of situation where you knew everything there was that you needed to know to help a person looking to renovate or do some building work? What would you do if it was the close friend of a very important friend to you or a family member?

I am absolutely certain that you would step in and that you would do all that you could to help them.

You care enough about your friend or family member to be able to make sure that the people that they care about are well looked after.

The same is true for referrals for health care. You have a responsibility, no, an obligation, to make certain that the family, friends and colleagues of your clients know about the care and services that you provide. Because you can be absolutely certain that they have the same level of care and compassion about the health of their family, friends and colleagues as you would have in the example provided a moment ago. They want the best care for the people that they care about... and you have a responsibility to let them know that that service and care is available here, at your practice!

Many clients may not think about these elements. You have a responsibility to help them to know and understand this, to think about it and bring it to their conscious awareness. Then, and only then, does it become a deliberate act for them to seek out the people in their own personal community who are in need of the services and care you provide, and offer them an opportunity to experience the wellness that they themselves are experiencing.

When you take this into consideration, you are beginning to create health and lifestyle for not only your immediate clients, but their family, friends and colleagues... and then, one person at a time, your entire community.

Truly, referrals are a valuable and powerful community service.

Here is another suggestion for a referral strategy.

Why not have a referrals queue on your client file?

For example, create a specific box or section of the client file that defines the referral strategy for that week.

It could be basing referrals upon a specific thing... the effects of not taking care of yourself with wellness care; referral theme of the month, such as headache, back pain... do you know any clients with these conditions?; family care referral week, etc.

By queuing a referral action, by focusing upon it in within a client file... it makes a systematic, consistent and therefore an effective element of the successful referrals-based practice.

## NOTES

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## *Transforming **your** health care practice **your way***

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