

INTERNAL REFERRAL CULTURE BEST PRACTICES

Building and Strengthening an Internal Referral Culture Involves a Series of Steps

Creating Working Partnership

Create working partnerships with all of your producers. Partnership begins with relationships. You will need to meet, in person or on the phone, with each of your producers and do some discovery — at least quarterly — of what’s going on in their world! Discuss the state of their business, plans for growth, their successes, challenges etc.



When you first meet with your producers, you might openly ask them, “If you saw someone tomorrow who you thought should look at this business, would you give me their name?” The resulting “yes” or “no” response will speak volumes about the existing referral culture in your office. A “no” response is never an easy one to hear, but a vital one to face.

By surveying your producers, you gain insight into areas for improvement, begin movement toward partnership and form the foundation for a referral culture at your office.

Follow-up

A critical step in developing an internal recruiting culture is follow-up. Nothing kills a referral source quicker than the black hole of recruiting. Producers want to know what transpired with their referrals. Whenever possible, and where internal policy allows it, make sure you get back to the agent or staff member about the referral. Even a quick thank-you note or a voice mail acknowledging that you made a connection with the referral painlessly avoids this pitfall.



Market the Opportunities

Use multiple internal marketing methods. Marketing draws people to you and gets the word out about both the opportunity and your recruiting effort. Create multiple methods for ongoing communication and internal marketing to your producers.



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