MARKETING ACTIONS THAT DEEPEN RELATIONSHIPS

The following are actions you can take to deepen your relationships. Rate; using a scale of 1 – 10 (10 being equivalent to absolutely), how likely you are to do any of these. Only consider taking part in activities in which you have a genuine interest. Include the actions with the highest score in your personal marketing plan.

The reference to referral sources includes clients.

____ Make a telephone call to find out what is going on in your referral sources business or personal life.

____ Find reasons to keep in touch. What’s going on in the world that would be of interest to the people you want to develop a relationship with?

____ Make lunch or coffee meetings.

____ Send an email to keep in touch.

____ Keep in touch with referral sources on Facebook.

____ Visit referral sources in their office or place of business.

____ Find ways to get to know their business – be curious.

____ Send information on something your referral source would be interested.

____ Send information on solutions to problems.

____ Inform referral sources of changes in the law that may affect them.

____ Use a newsletter to inform referral sources what is going on in your practice.

____ Mail a note or card acknowledging something your referral source accomplished.

____ Make referrals to your referral sources.

____ Volunteer at events that show what you are capable of.

____ Send congratulation cards.

____ Send thank you cards.

____ Send birthday cards.
____ Send holiday cards.

____ Invite a referral source to join you at a presentation you have a common interest.

____ Invite a referral source to join you at a networking event.

____ Attend sports events with referral sources.

____ Engage in entertainment activities like golf, theatre, special events with referral sources.

____ Serve on your referral source’s committees (but, only if they interest you).

____ Arrange a referral source appreciation networking gathering.

____ Serve as a volunteer for groups in which your referral source is interested (but, only if you too are interested).

____ Have a firm open house.

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