



# Referral Campaign

## Free Resource

### Disclaimer

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# Referral Campaign Process

You are welcome to change the details, but the way we typically handle our referral program is this:

## **Reward EVERY Referral With a Generous Thank You**

We recommend sending a generous local gift card or a nice cookie tin to the person who gave you the referral. If you send a gift card, don't just buy them a coffee, take them out to dinner. Even better? If you have clients with restaurants (I know, it's rare for some MSPs), treat your referral givers there!

**Always send a gift, even if the referral is a dud.**

## **Stay Transparent and Communicate Throughout the Referral Process**

Treat your referrals as your finest, most sacred leads. Communicate thoroughly, give them plenty of attention, and keep the contact who referred them to you in the loop as well. If you use JoomConnect, check out our Quick Referral Addon, which includes processes in ConnectWise and Autotask to manage a sales referral from beginning to end.

## **Offer at Least \$500 Off for the Business for Any Successful Referrals**

Once a referral signs a contract, give the client that referred them a very generous discount on their next bill. It could be \$500, it could be \$1000, it depends on what they are spending with you. It should feel significant, but obviously it should be worth it for you too. For us, we tend to give them a free month of service, as long as the referral is comparable. It's not a bad idea to simply have a number though, so you can tell people upfront what they'll get, and then if you want to increase it for certain clients as a nice gesture, you can.

## **Extend the Same Discount for the Referral**

Give your new client the same discount that you give the company that referred them. You might not think of it like this, but this is the real value of your referral program. There's some real power when it comes to equipping your clients with a nice little favor like this. Everyone knows that every business needs an IT provider. If your clients know they can offer their friend and colleagues a handsome upfront discount by referring them to you, suddenly it gives them a little leverage. It's a little something they can have in their back pocket. Your MSP becomes a secret weapon for them, a favor they can extend.

**When you pitch this to your clients, make it feel exclusive.**

*"Hey and while I'm thinking about it, if you refer someone over to us, and they sign a similar support agreement, you'll get a free month, and I'll even extend that free month to them as well, just because it's you."*

You are giving them something valuable. More valuable than a month off their agreement too—you are empowering them to give their friends and colleagues something of value. We all love having something in our back pocket to offer as a favor.

# Referral Campaign Landing Page Text

Please note that red text below is just to note formatting (such as headings). There are a few terms in all caps that get automatically replaced if you have an Ultimate MSP Website (like COMPANYNAME and AREASERVED). If you don't have an Ultimate MSP Website, you'll need to replace those terms with applicable content.

## Landing Page Content

### Heading 1: COMPANYNAME's Referral Program

#### Heading 2: Love our Services? Help us Serve Others!

If you're satisfied with the services you receive, we're glad to hear it. It means so much to us that you're happy with the work we do. We're always adapting our strategies to meet the best industry standards, and we're glad that we can share our expertise with great people like you.

As a business owner, you understand the pain points that technology can solve for businesses like yours. There are undoubtedly other businesses in the AREASERVED community that are struggling with their technology. This is where you come in. You have the chance to make a difference in your friend's or colleague's business operations. All you have to do is refer them to COMPANYNAME. If you love our services, we're sure that they will, too!

#### Heading 2: Get a Free Month, On Us

Each new referral that signs up for a long-term managed services agreement will earn you a free month of your agreement.

#### Heading 2: Your Referral Gets the Discount Too!

It doesn't stop there, however. We want your recommendation to feel like a favor to your friend or colleague, so we will also give them the same discount we offer you!

If you know a business who could use a hand with their technology management, fill out the form to the right. We're sure that they'll appreciate it.

#### Details and Fine Print:

- Referring partners eligible for the referral discount after the referred prospect signs a managed services contract and is in good standing.
- COMPANYNAME must receive your referral notification of the referral prior to them becoming a COMPANYNAME client.
- Referring partner needs to have 6 months of invoices paid and be in good standing to be eligible for the referral bonus. If the referring partner is a new client of COMPANYNAME, the referral bonus will be delivered after the first 6 months of invoices have been paid and the account is in good standing.
- This referral program is subject to change at any time. Check this page for updates.
- All referrals are subject to the final approval of COMPANYNAME.

# Referral Campaign Email Text

Please note that red text below is just to note formatting (such as headings). There are a few terms in all caps that **need to be replaced**, like COMPANYNAME and REFERRALURL. Please note that these emails should be sent as plain text, from an actual contact (not info@ or sales@). They should be as personal as possible.

Feel free to adjust this content as you feel necessary.

## Email 1

### **SUBJECT: Refer a Friend Program**

Hello [FIRSTNAME],

I'm really hoping to get in front of other local businesses, so we're running a referral program and offering a free month off your agreement for every referral we get that signs a managed services contract. You'll see a more official email in the next few days, but due to the nature of our relationship together, I wanted to reach out to you directly.

Do you know anybody who would benefit from our services?

If you refer someone over to us, and they sign a similar support agreement, I'll even extend that free month to them as well, just because it's you.

Alternatively, you can submit them here: [REFERRALURL] and we will get in touch with them.

I appreciate your time,

[YOURNAME]

## Email 2

### **SUBJECT: Like what we do? Help us spread the word!**

Hello [FIRSTNAME],

I wanted to take a moment to thank you for entrusting [COMPANYNAME] with your company's IT.

Speaking of trust, we've found that people trust the recommendations of colleagues, friends, and family more than any other source. Do you know anybody who would benefit from fewer computer issues and IT solutions that are designed to actually drive business forward?

We're running a referral campaign, and for every referral you send us that signs a managed services agreement, we'll give you a 1-month discount on your managed IT agreement, and we'll extend the same discount to the business you refer to us.

You can check out [REFERRALURL] for more details.

Thanks, I appreciate your time!

Sincerely,

[YOURNAME]

# Referral Campaign Welcome Email

Send this email to a new prospect that a client has referred to you. To increase the transparency, you should consider CCing the person who referred them over to you as well!

Please note that red text below is just to note formatting (such as headings). There are a few terms in all caps that **need to be replaced**, like COMPANYNAME and REFERRALURL. Please note that these emails should be sent as plain text, from an actual contact (not info@ or sales@). They should be as personal as possible.

Feel free to adjust this content as you feel necessary (and follow up with a phone call too!)

## Welcome Email

**SUBJECT: [CLIENTNAME] Referred You To Us**

Hello [FIRSTNAME],

My name is [YOURNAME], I'm the [YOURTITLE] at [COMPANYNAME]. We've been working with [CLIENTNAME] as their IT solutions provider, and they gave me the heads up that you might need some help with your technology.

I'd love to set up a quick meeting with you to go over your pain points.

Since your business was recommended to us by [CLIENTNAME], we also want to extend a special discount.

Do any of these times work?

[INSERT AVAILABLE TIMES TO MEET]

I appreciate your time,

[YOURNAME]