



## The Referral Edge

# The Referral Trigger Checklist

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Use this checklist to find out why referrals may be slow — and where you can make quick fixes. Answer each question honestly. The more 'yes' answers you get, the more referral-ready you are.

- Do your clients know exactly who you work with?
- Do your clients know the main problems you solve?
- Can clients describe what you do in one short sentence?
- Do you use a memorable name for your main service or process?
- Have you told clients when is the best time to refer you?
- Do you give clients examples of the kinds of people you help?
- Have you made it easy for clients to pass on your details (link, card, or template)?
- Do you share client success stories or case studies publicly?
- Do you keep in touch with clients in small, regular ways so they don't forget you?
- Have you ever thanked a client for a referral they gave you?

How to score yourself:

0–4: You have big referral leaks — focus on clarity and connection.

5–7: You're on the right path — fix the missing triggers to see growth.

8–10: You're referral-ready — now work on building more trigger moments.