

## 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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