

Make it easy to recommend.

The Introduction Kit for concierge & DPC practices

A sentence members can repeat, something they can pass along, and a way in for the friend that can't fail.

01 Write the sentence.

“Call Dr. Amari. She actually calls you back.

Go to the website and book the free visit.”

Our name, the way a friend would say it: _____

The reason, in a member's words: _____

The next step: _____

A name that can be said, a reason that can be repeated, a next step the friend can describe.

02 Make something to give.

“Nothing to buy. If someone comes to mind, this is for them, with your name on it.”

What it is (a conversation, an evening, a call): _____

When: _____ Whose name goes on it: _____

A referral request asks a member to sell. An introduction gives them something to give.

03 Make referring safe.

Every referral is a loan of reputation.

Answers a referred friend: _____ How fast: _____

Says the member's name: _____ Sends the thank-you, by when: _____

Thank the member without a single private detail. The note says the loan was repaid.

04 Find the moment.

Hand it over when they're already grateful, not on a schedule.

For example: a call returned in four minutes, a specialist in three days instead of three months.

Moments here when a member is grateful and specific: _____

Then one sentence: “If someone you know ever needs this, give them my number.” Then let it go.

05 Set the standard.

Every member hears the same sentence, and it stays true.

A referred friend gets a direct line and a meet-and-greet the same week.

Every introduction gets a thank-you to the member within a week, with nothing private in it.

Stop asking who they know. Start giving them something to hand over.

Our sentence, final: _____

Who owns the thank-you: _____ Referred friends this month: _____