

SOP – Client Referral System (Post-Project)

? Objective

Create a **consistent, non-pushy referral system** that maximizes high-quality referrals from satisfied clients after project completion.

This SOP ensures referrals are **asked at the right time**, with the **right message**, and **tracked properly**.

? Scope

Applies to:

- All completed Fiverr projects
 - All direct / off-platform clients
 - Website design, redesign, and development services
-

? Core Principle

Referrals work only when **timing, simplicity, and reward** are aligned.

Never ask randomly. Never ask emotionally. Always ask systematically.

?? When to Ask for Referrals (Non-Negotiable)

Ask for referrals **ONLY** when all conditions are met:

- Project is delivered and accepted
- Client is satisfied (positive feedback or review)
- No pending revisions or complaints

☐ Never ask during revisions or delays.

? Referral Reward (Standardized)

Use **one clear reward** only:

- ☐ **\$50-\$100 OFF** next service
OR
- ☐ **Free value-based add-on** (speed optimization, SEO setup, extra page)

⚠ No cash payouts unless approved.

? Approved Referral Message (Primary)

Send immediately after project acceptance:

I'm really happy to hear you're pleased with the website – working with you has been a great experience ☺☺

I'm glad we could build a solid business relationship together.

Most of our projects come through word-of-mouth, so I wanted to ask – if you know anyone who's looking for a new website or a redesign, I'd truly appreciate an introduction.

As a small thank-you, I offer a 10% discount on your next project for every successful referral.

No pressure at all – just sharing this while everything is fresh.

And of course, I'm always here if you need anything.

? Make Referring Easy (Mandatory)

Always include a **ready-to-forward message**:

Hi, I recently worked with Jehan from Fiverr on my website and had a great experience. The communication was smooth, the work was professional, and the final result turned out really strong.

You can see my website here:

☺☺[Client Website Link]

Jehan is a Top Rated Seller on Fiverr, has 6+ years of experience, and has completed 2500+ website projects for clients worldwide.

If you're looking for a reliable Website Developer for a new website or redesign, you can check him out here:

☺☺https://www.fiverr.com/jehanzaib_007/

This removes friction and increases referral rate.

? Referral Tracking Procedure (Mandatory)

When a **new client confirms they were referred**:

1. **Confirm the Source**
 - Ask clearly: *“Who referred you to us?”*
 - Do not assume or guess.
2. **Update CRM Record**
 - Add the client’s **username** in the CRM
 - Apply the label: **Referral**

The screenshot shows the CRM interface for 'inzoneagency'. The lead record is titled '4 out of 26'. On the left, there are fields for 'Category' (Hot Lead), 'Username' (inzoneagency), 'Website' (Click to add website), 'Last Messaged' (MM/DD/YYYY), and 'Next Follow-up'. On the right, there is a 'Labels' section with a red box around it containing a 'Referral' label and a search field. Below the labels is a 'Notes' section with the text 'Referred by: bgsone'. A 'Close' button is located at the bottom right of the interface.

Referred by: [Referrer Name / Username]

inzoneagency
4 out of 26

Category
Hot Lead

Username
inzoneagency

Website
Click to add website

Last Messaged
MM/DD/YYYY Update

Next Follow-up

Labels
Referral Search or select labels

Notes
Referred by: bgsone

Close

? Non-Negotiable Rule

If the referral source is not logged in the CRM, the referral does not exist.

No tracking = no rewards = system failure.

? Forbidden Language (Never Use)

Do NOT say:

- "Please help me"
- "It would mean a lot"
- "I'm struggling for clients"
- "Can you do me a favor"

This reduces perceived value.

? Golden Rule

Referrals are asked at the moment of highest trust — not randomly, not emotionally.

This SOP protects brand value and compounds growth.

Revision #2

Created 25 December 2025 10:44:51 by Jehanzaib

Updated 25 December 2025 11:06:54 by Jehanzaib