

EXERCISE 7 – Build the sales engagement plan

If your direct and/or channel sales teams are not involved in recruiting referral partners and sourcing referrals from them - they should be! Referral partner programs where sales is involved have a 32% higher success rate for referrals making a purchase.

Use the 10-step checklist below to get your sales teams the tools and structure they need to be successful in making referrals a part of their go-to-market strategy.

Step	Activity	Deliverable	<input checked="" type="checkbox"/>
1	Meet with head of sales to determine level of involvement.	Commitment from sales leadership for driving recruitment and referrals.	
2	Work with sales leadership to set activity goals.	Objectives by salesperson for number of referral sources and number of referrals per month/quarter/year.	
3	Work with sales leadership to determine changes to sales incentive structure.	Any changes to sales compensation based on meeting recruitment and referral goals.	
4	Work with sales operations to enable sales with tools to drive recruitment.	Add ability to invite CRM contacts with pre-filled registration.	
5	Work with sales operations to enable sales with tools to collect referrals.	Add ability to input verbal referrals in CRM and ability to "own" referral sources for reporting.	
6	Work with sales operations to provide referral status transparency.	Add ability to see who made the referral on each lead record and ability to click into referral history of that partner.	
7	IF direct sales team: Work with sales operations on lead routing rules.	Change lead routing so that any referral lead that comes from a source that salesperson "owns" gets routed to that salesperson.	
8	Work with sales operations to get sales leadership reporting.	Dashboards in CRM that track recruitment, referral leads, referral opps and successful referrals by salesperson/territory/etc.	
9	Run pilot rollout with one sales group.	Feedback to improve process as well as data and testimonials to show success.	
10	Rollout program to full sales team with training and internal campaign.	Trained sales team who is actively recruiting and collecting referrals.	