

Employee-to-Customer Referral Program Template

Encourage employees to refer potential customers

1: Overview

Define when you want your program to launch

Briefly outline all the elements you'll need in place prior to launch day

2: Goals for your program

Set revenue-related goals to determine if the program is delivering a strong ROI

Goals should be SMART: Specific, measurable, attainable, relevant, and time bound

3: Tracking and software

How will you track the referrals employees make?

Will you use employee referral software for tracking? Which software?

4: Rewards

When are employees eligible for rewards? (i.e., when referrals make a purchase, or when a lead is qualified?)

Will you reward the new customer as well, once they make their first purchase?

What rewards will you give out to referring employees?

What rewards will you give new customers?

Will you gamify your program, with extra rewards for the top referrers of the year?



5: Terms and eligibility

Can all employees refer new customers and earn rewards?

Or must employees be trained as ambassadors first, before they can participate?

6: How the referral process works

How do employees submit referrals (i.e., through a form or portal)?

What information about the leads they're referring must employees submit?

What ways are available for employees to send referrals (i.e., email, social media messaging)

Can employees write their own message to the candidate? Or will you provide a template?

7: Program promotion

How will you let employees know about the program (i.e. email, in-person meetings)

8: How to brief employees about the program

Who should they refer? Cover what makes an ideal customer.

What info should they cover about your brand within a referral message?

How will you help employees get their message across without sounding salesy?

Train employees on how to use the referral program and track the status of their referrals



9: How you'll communicate with employees

How will you inform employees of the status of their referrals?

How will you check in with employees about program updates (and further training opportunities, if applicable)?

How can employees reach you with questions about the program?

