

# *Welcome to* **Dilate's Customer Referral Templates**

Inside this document you'll find a range of email templates that you can use to help get you more referrals. Since there are many ways and occasions to ask for a referral, we have organised the templates into sections so that you can find and tweak the ones that will suit you the best.



## **Email**

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## **Call Us**

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## **Website**

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Use the links below to jump directly to a specific template.

- **Templates for Asking for a Referral Directly**

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# Templ

## Templates for **Asking for a Referral Directly**

## 01 Asking a customer if they have anyone in mind to refer you to

Hi [Customer Name],

I'm so glad to hear that our [service/product] has been working well for you and your team. I've loved working with you to help create a positive impact for [their brand's name].

Since you've experienced firsthand what our [service/product] can do, I wondered if you might know of any [friends/colleagues/other companies in the area] who are also looking to [insert core value proposition of your product or service. E.g. "improve their website's SEO"]? I would love to help them achieve some awesome results too.

[IF APPLICABLE, OFFER AN INCENTIVE]

I generally [normal, non-referral detail. E.g. "charge \$x for a 30-minute consultation"], but I'd love to provide [referral benefit. E.g. "a completely free consultation"] for anyone you send my way.

[Give the necessary details for the benefit to be claimed. E.g. "When they book a consultation, all they have to do is put the following personalized code in: 1234."]

If they end up using the referral code, we'd love to offer you [insert referrer's benefit here. E.g. "10% off the next month's invoice"].

Do you have anyone in mind who might be interested?

Kind regards,  
[Your Name]



## 02 Asking a partner, vendor or affiliate if they have someone in mind that they could refer you to

Hi [Contact's Name],

I just wanted to take a moment to say [their company name] has been doing an amazing job lately. We've had a few clients recently who also work with [their company name] and have seen some great results with [main service/product they offer. E.g. "their social media growth"].

I think that what [their company name] and [your company name] have to offer makes a pretty powerful combination. I have a few other clients that might be interested in your [their product/service. E.g. "social media marketing services"], and could point them your way if you're interested?

If you know any clients who would also benefit from our [your product/service. E.g. "website SEO services"], would you consider sending them our way? I'd love to help them out.

Kind regards,  
[Your Name]



### 03 Asking a competitor if they have someone in mind that they could refer you to

Hi [Contact's Name],

I just wanted to send a quick email to say that I really admire the work you do in [type of work/niche. E.g. "candid wedding photography"]. Recently, I've been getting more enquiries in that area but I'm having to turn them down because at [your company name] our focus is more on [your type of work/niche. E.g. "elopements and intimate weddings"].

Would you be interested in me sending any future enquiries for [their niche. E.g. "larger weddings"] in your direction? I'd be more than happy to do so because even though our focus is different, I feel that [their company name] and [your company name] have a similar [core quality you share. E.g. "aesthetic and approach"] that clients would be attracted to.

If you have any overflow of enquiries for [your type of work/ niche. E.g. "elopements and intimate weddings"], would you consider sending them my way?

Looking forward to hearing from you soon,  
[Your Name]

# Templ

## Templates You Can Give to Your Current Customer to **Send to Someone They Know**

Do you have a loyal customer who knows someone they can refer you to? Make it easier for them to reach out to their contact by sending through these templates that they can use.

Note, the templates below are meant to be used by the referrer and so they address the person whom your customer is recommending you to.

## 01 Send to loyal clients you have worked with repeatedly or for a long time who want to refer you to a friend

Hi [Referral],

I hope this email finds you well.

I'm just reaching out because I know that you [activity that the referral does that they may need help with. E.g. "regularly advertise with Facebook"].

Lately, I have been working with [Your Name] and have been impressed with the results they've been able to achieve for my business. They recently [explain the service/result you supplied. E.g. "set up Facebook and Google Ads campaigns"] which helped my business [outline the impact your service had. E.g. "double our conversions and increase our profit margin by 30% last month"].

If you're in need of [type of work/service you provide], I would highly recommend [Your Name].

At the moment, they're offering [benefit for referrals. E.g. "10% off their usual package for any new customers who sign up"].

Here's their details, if you're interested:

[Your Name]

[Your Email]

[Your Website Link]

If you have any questions, let me know.

All the best,

[Referrer's Name]



## 02 Send to clients who are willing to make a direct introduction

Hi [Referral],

How are you going?

I'm just getting in touch because I thought you might be interested in a great [your type of company. E.g. "digital marketing agency"] that I have been working with. [Your Name] has helped me [main success/impact you have had. E.g. "increase traffic and sales, to almost double what I had last year"].

I thought I'd introduce you to [Your Name], in case you'd like to check out their services.

[Referral], meet [Your Name].

[Your Name], meet [Referral].

Let me know if I can help in any way, otherwise I'll leave you both to it.

Kind regards,

[Client making introduction]



### 03 Send to clients who are willing to cc you into the email

Hi [Referral],

I hope all is well with you!

I wanted to drop you a quick email to put you in touch with [Your Name]. I've been working with [Your Name] on [type of work/service] and thought their services might be of use to you too.

[Your Name] provides [type of work/service. E.g. "commercial photography services"], and I've been really impressed with their [core positive traits. E.g. "efficiency and attention to detail"].

I've cc'ed [Your Name] so you can get in touch if you think they're a good fit for you.

Let me know if you have any questions, otherwise I'll let you two take it from here.

Best Regards,  
[Referrer]

# Tempo

Templates for You to Send to  
Someone Who's Just Been  
**Referred to You  
by One of Your  
Customers**

Use the following templates when first making contact with someone who has just been referred to you.

## **01 Use this template if you provide a consultative, ongoing type of service**

Thank you, [Referrer], for the kind words and the introduction.

Hi [Referral],

It's great to be put in touch with you.

I've really enjoyed working with [Referrer] to achieve [highlight key results. E.g. "a 25% increase in sales since I began working with them 9 months ago"].

I'd love to discuss your goals with you and how I can help you achieve them. Would you have time for a quick chat [give specific time. E.g. "tomorrow afternoon"]?

I look forward to connecting with you!

Warm regards,  
[Your Name]



## 02 Use this template if you provide one-off services or custom products [Casual]

Thanks for the introduction and the kind words, [Referrer's Name]!

Hey [Referral],

It's really great to meet you.

I worked with [Referrer] recently on [type of service/product here. E.g. "her custom shed design"] and I wonder if you'd be interested in my services too.

Since our friend [Referrer] put you in touch with me, I'd love to offer you [referral benefit. E.g. "a free onsite consultation and quote"].

If you're interested, shall we set up a time to discuss? I'd love to host you at my studio if you're available sometime next week. Let me know when suits you best.

I'm really looking forward to chatting with you.

Cheers,  
[Your Name]



### **03 Use this template if you provide one-off services or custom products** **[Formal]**

Thank you, [Referrer], for the kind words and the introduction.

Hi [Referral],

It's great to be put in touch with you.

I've really enjoyed working with [Referrer] to achieve [highlight key results. E.g. "a 25% increase in sales since I began working with them 9 months ago"].

I'd love to discuss your goals with you and how I can help you achieve them. Would you have time for a quick chat [give specific time. E.g. "tomorrow afternoon"]?

I look forward to connecting with you!

Warm regards,  
[Your Name]



# Templ

## Templates to Send to a **Customer Who Has Referred Someone to You**

Don't forget to thank customers who recommend you to someone. Taking time to thank them will help solidify their trust in you and might open the door to more referrals in the future.

## 01 Thanking a long-time customer for a referral [Casual]

Dear [Referrer],

A huge thank you for referring your [colleague/friend] [Referral] to me!

It means so much that you were happy with the work we did that you shared [Your Business Name] with someone else. I really appreciate that you took the time to do that. I'm excited to have the opportunity to help [Referral Name] [your service/work. E.g. "improve their online marketing strategy and get more conversions"].

[IF APPLICABLE] As a thank you, I'd love to take 10% off your invoice for next month.

Thanks again,  
[Your Name]



## 02 Thanking a long-time customer for a referral [Formal]

Dear [Referrer],

Thank you for taking the time and effort to introduce me to [Referral Name]. I really appreciate that you trust and value my work enough to recommend my services.

I'm grateful for the opportunity I've had to work with you and sincerely thank you for your continued support. I look forward to working with you again in the future and continuing to gain positive results for [Referrer Business Name].

With appreciation,  
[Your Name]



### 03 Thanking a one-time customer for a referral

Dear [Referrer],

I wanted to send you a sincere thank you for referring [Referral Name] to me. I really appreciate that you took the time out of your schedule to share [Your Business] with someone else. It means a lot that you are happy with our services, and we are grateful for the opportunity to work with [Referral Name] to [your service/work. E.g. “design a stunning website”].

If I can be of service in the future, please reach out. It would be a pleasure to work with you to achieve great results again.

Many thanks,  
[Your Name]