

Business referrals to WBG members.

Business referrals received by members should be notified to the group's referrals monitor for recording.

Qualifying referrals are any viable opportunity to do business, and may be received from:

- Existing members
- Former members
- Speakers and guests

Please let the monitor know the name of the provider of the referral for the first two categories.

Sometimes there is some debate about when to record a referral, but here are a few pointers:

- A valid referral is an opportunity to obtain remunerated work, even if you ultimately do not obtain it. So you may be too expensive, or may feel you do not have the capacity to do the work, but that should not invalidate the referral.
- However, you may get a referral for something that you do not do. That may still be recordable, particularly if the referrer would not have known what the third party wanted. That would particularly be the case for those members operating in areas that require confidentiality. Use your judgement here!
- You should have an opportunity to make contact with the person ordering the work – so a good referral from a fellow member is perhaps an email to both you and the buyer giving you each other's contact details.
- Sometimes the person wanting your contact details will not want their details given to you directly. So a referral is not “I have given your name to John, and he will hopefully contact you”. But if John does contact you, then it becomes a referral. Which is why we have a system whereby the receiver records the referral, not the giver.
- Unremunerated work is not a referral in itself unless and until an opportunity arises later to actually quote for work. But if you give a free introductory meeting (as I do), but nothing comes of it, it is a valid opportunity to quote, and therefore a referral. It may be that Jane does not actually need an accountant, but the referrer won't know that.
- And bear in mind that sometimes a referral may be a slow burner. It is good practice to find out where a prospective customer comes from, and do dig a bit: on many an occasion a prospective client/customer says that he looked the business up on the internet, when in fact he was looking up contact details because he had actually been recommended by someone.
- Finally, we do not record recurring work: i.e. if a recommendation visits X for a first appointment, that will be a recordable referral. But if she then goes back every 8 weeks, those subsequent visits are not recordable.
- But do record new work - e.g. Y gets recommended to a client to do a garden clearance job for a buy to let, that will be a referral. But then if that same client asks him to maintain his own garden, that is a fresh referral.

If in doubt, notify it!