



# Referral Marketing

*A Free Guide With KEAP Tips & Ready-To-Use Email Templates*

## Why it matters

Warm leads with built-in trust

## Where KEAP fits

Organize, follow up, automate

## What you get

Templates you can use right away

## Why Referral Marketing Matters

**Referrals help businesses grow through trust.** When a happy customer recommends a business, the next conversation starts warmer, with more credibility, and often with less resistance. Instead of leaving growth to chance, businesses can create a simple referral process that helps them ask more consistently and stay top-of-mind.

## Why Every Business Needs A Referral Program

Without a system, businesses often forget to ask for referrals or ask at the wrong time.

A referral program gives customers a clear next step and gives the business a repeatable process.

When referrals are tracked, followed up on, and thanked, they become a real growth channel instead of random word-of-mouth.

[www.GetTMC.com](http://www.GetTMC.com)

1-888-249-9919



## Where KEAP Fits In

**KEAP is a small business CRM and automation platform.**

It helps businesses organize contacts, track leads and clients, automate follow-up, and build simple growth systems around communication and relationships.

KEAP can help with	What that means for referral marketing
Contact organization	Keep leads, clients, and referral sources in one place
Tags and notes	Track who referred whom and where opportunities came from
Email & text follow-up	Send thank-you messages, check-ins, and referral asks more consistently
Automations and workflows	Build a repeatable process instead of relying on memory
Appointments, invoices, payments	Support the full client journey from lead to paid customer

## A Simple 5-Step Referral System

- 1. Pick the best moment to ask** - Ask after a positive experience, successful project, repeat purchase, or thank-you message.
- 2. Make the ask simple** - Tell customers exactly what to do: share your name, forward your email, or introduce someone.
- 3. Make it easy to share** - Use a link, short email, text template, or QR code.
- 4. Follow up consistently** - Thank referral sources and keep in touch with past clients.
- 5. Track what is working** - Watch which messages get replies, referrals, and repeat business.



## Simple KEAP Workflow Example

Step	Action
1	Customer completes a purchase or service
2	KEAP sends a thank-you email
3	A few days later, KEAP sends a check-in email
4	KEAP sends a referral ask at the right time
5	Contact is tagged by response or referral source
6	Business follows up and thanks the referral source



### **1. Thank You & Soft Referral Ask**

*Subject: Thank you again*

Hi [First Name],

Thank you again for choosing [Business Name]. We're so glad we had the chance to help.

Our goal is always to make things a little easier and help you move forward with confidence. If you ever need anything, we're here for you.

And if someone comes to mind who could use the same kind of support, we would truly appreciate you sharing our name.

Thank you again,  
[Business Name]

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### **2. Follow-Up Check-In**

*Subject: How is everything going?*

Hi [First Name],

I've been thinking about you and wanted to check in to see how everything's been going since we worked together.

I hope things have felt a little easier and that you're seeing the kind of results you were hoping for. If any questions have come up or you need anything at all, we're always here and happy to help.

And if someone comes to mind who could use the same kind of support, we'd be truly honored if you shared our name.

Thank you,  
[Business Name]

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### **3. Referral Request**

*Subject: A small favor*

Hi [First Name],

Working with people like you is truly the heart of what we do, and we're so grateful for your support.

If someone comes to mind who could use our help, we would really appreciate an introduction or referral. You're always welcome to share our contact information, or simply reply here and we'll take it from there.

Thank you again for your trust. It means a lot to us.

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#### 4. Review & Referral Email

*Subject: Thank you for your support*

Hi [First Name],

Thank you again for choosing [Business Name]. We're truly grateful for the chance to serve you.

If you had a great experience, it would mean so much if you shared a review. And if someone comes to mind who could use what we offer, we'd be honored if you passed our name along.

Your support genuinely means a lot to us and helps us reach more people who need what we do.

Thank you,  
[Business Name]

#### 5. Reconnect with Past Clients

*Subject: We'd love to reconnect*

Hi [First Name],

Thank you again for choosing us. We're truly grateful for the opportunity to work with you.

If you had a great experience, it would mean so much if you shared a review. And if someone comes to mind who could use what we offer, we'd be honored if you passed our name along.

Your support really does mean a lot to us and helps us continue serving others.

Thank you,  
[Your Name]

**[Business Name]**

**Start simple. Stay consistent. Build a process you can repeat.**

#### Special Offer for Attendees

As a bonus for attending this training, we're offering **50% off your first 3 months of KEAP**

If you're ready to build a simple system for follow-up and referrals, this is a great way to get started without overthinking it.

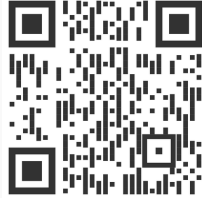
#### Next Steps:

- Schedule a quick call with our team
- We'll help you set up your first simple workflow
- Start using KEAP to stay connected and grow referrals

**SPECIAL OFFER: 50% OFF  
YOUR FIRST 2 MONTHS!**

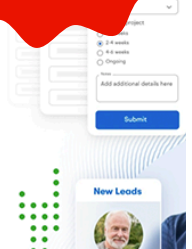


You have a **PASSION** for your Business and  
We've Got the Tools to help you **GROW!**



**A CRM software that  
automates your entire  
business**

Grow your revenue, increase lead generation,  
improve retention, and save hours on manual  
tasks.



## UNLOCK MORE SALES & SAVE TIME WITH KEAP!

### WHAT IS KEAP?

KEAP is the all-in-one CRM that helps you manage customers, automate tasks, and streamline sales & marketing—so you can focus on growing your business.

### IS KEAP RIGHT FOR YOU?

- Do you want to **increase sales & efficiency**?
- Is **saving time & money** important to you?
- Would automating tasks **boost your bottom line**?

✓ **Marketing**

✓ **Sales**

✓ **Operations**

**+39%**

increase in revenue—  
helping you grow  
faster and keep more  
money in your pocket

**+53%**

more leads—giving  
you confidence in  
where your next sale  
is coming from

**keep**

## KEAP PLANS & PRICING

**One-Time Setup - \$500**  
**Plans Starting at \$145/mo**  
**2 Users**  
**2500 Contacts**

### Includes:

5 Hours 1:1 Support + 2 Campaigns  
Monthly Live Group Coaching  
Unlimited Support (Live Chat & Calls)  
Access to Unlimited Training Videos



**\$160 Savings**

**Don't miss out! Get 50% off your first 2 months!**  
Contact us today for a **FREE** consultation and discover how  
KEAP can streamline and grow your business!