

# Referrals for Infor CRM

The Referrals enhancement tool for Infor CRM tracks the flow of referrals, both in and out of your firm, allowing you to focus and nurture valuable relationships that bring more business.

A circular icon containing two overlapping speech bubbles. The top bubble is white with three red dots inside, and the bottom bubble is blue. The entire icon is set against a light blue circular background.

## Introduction

Drumming up brand new business requires more time and work than gaining clients through recommendations. Collier Pickard's Referrals tool is designed to make it easy to track, analyse and develop relationships which yield valuable business through referrals.

## When word-of-mouth pays off

Studies show (Harvard Business Review, Nielsen, Forbes) that referred clients are more profitable and loyal than other types of clients. Why? Because the recommendation often comes from a trusted source, someone who has the experience or expertise in the product or service in question. It would therefore make sense to nurture those channels where referrals take place.

But referrals aren't one-dimensional. They aren't just clients referring your business to other organisations. Referrals can include suppliers, intermediaries and business partners recommending your business to their clients. Referrals can be inter-departmental recommendations; it can even include referrals that you've made externally.

That's all very well, but why bother with keeping track of referrals?

The answer lies in long-term profitability. Nourish those relationships that bring you business, and stop wasting time on those that don't. Understand what is required to build on your reputation so that you can develop and grow your business.

## Benefits of using Referrals

- Promotes long term, profitable relationships with clients and vendors
- Encourages better quality leads
- Increases the likelihood of winning referred business
- More effective selling methodology than other methods

Summary of all referrals that a particular organisation has sent your way

Ease of use: the ability to record various types of referrals with the click of a button

Referral #	Contact	Type	Internal/External	Direction	Status	Size
001-00-027500	Abbott, John		Internal	In	Open	
001-00-027501	Abbott, John		External	In	Open	
001-00-027502	Abbott, John		External	Out	Open	
001-00-030123	Abbott, John		External	In	Open	1,500.00 GBP

**Referral - 001-00-028819 - External In**

Referral Number: 001-00-028819      Status: Open

Internal In    Internal Out    Organisation: Advising Group    Original Type:    Referral Size:    Sold As Type:    Source:    External In    External Out    Contact: Fincher, Brian

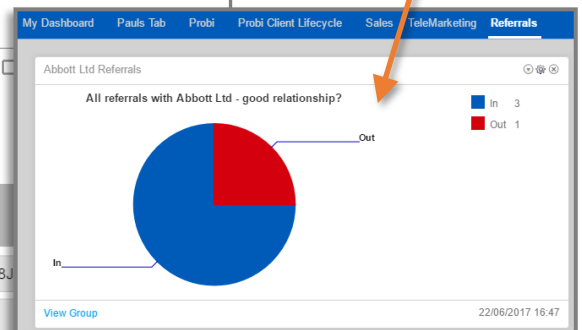
Description:    Follow Up By:    Follow Up Complete:    Opportunity:    Send Email    Create Opportunity

Referred From: Organisation: Above Marine    Contact: Hutchison, Helaine

Referral Leader: Nicol, Scott    Follow Up By:    Follow Up Complete:    Opportunity:    Send Email    Create Opportunity

Source:    Referral ID: QDEMOA000M8J    Referral Number: 001-00-028819    Create User: Nicol, Scott    Modify User: Nicol, Scott    Create Date: 9/22/2016 12:27 PM    Modify Date: 9/22/2016 12:27 PM

Reporting can be done via dashboards, enabling quick & easy overview of success rates in different referral types



## Further information

Get in touch today for more information about Collier Pickard's Referrals tool for Infor CRM and we'd be happy to discuss your needs.

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