

**ORANGE PARK MEMBER RESOURCE**

The Better Referral Playbook

A practical way to recognize a real opportunity, make a useful introduction, and follow through.

Put this into practice

- ✓ Start with a trigger, not a category. Ask members for a situation, customer need, timing, and location that indicate a good fit.
- ✓ Learn the handoff: who should be introduced, the best channel, the minimum details needed, and what the member will do next.
- ✓ Ask permission from both sides before sharing a phone number or email. A warm introduction should preserve the customer's choice.
- ✓ Explain the match in one sentence. State why you thought of this member without promising a result or making an unverified claim.
- ✓ Close the loop after a few days. Confirm the introduction was received and record only the outcome you need to improve future referrals.

Use these words

I thought of you because you mentioned [specific need]. I know [member name] at [business], who handles [relevant work]. Would you like me to make an introduction?

With both people's permission: [Customer], meet [member]. The need is [short context]. I'll let the two of you take it from here.

Write your own version

My best-fit customer or member: _____

A clear situation that tells me to act: _____

The first step I will take this week: _____



Make it repeatable

Use this page as a short working sheet. Assign a next step before the conversation ends.

Before you share or recommend

- ✓ Is this within the member's actual service area and scope?
- ✓ Have I asked before sharing anyone's personal details?
- ✓ Am I describing the business accurately, including any limits I know?
- ✓ If I receive an incentive or have a material connection, am I disclosing it where appropriate?
- ✓ Did I note a follow-up date and avoid pressuring either person?

Your next 30 days

- ✓ Week 1: Write two specific referral triggers and a 20-second explanation of your ideal customer.
- ✓ Week 2: Hold two one-to-one conversations and learn each member's handoff preference.
- ✓ Week 3: Make one permission-based introduction where there is a genuine fit.
- ✓ Week 4: Review the outcome, thank the connector, and refine your referral trigger.

Track the outcome

People I contacted: _____ Useful introductions: _____ Follow-ups completed: _____

One thing I learned this month: _____

My next specific ask: _____

Further reading

U.S. Small Business Administration, Build Your Business Through Networking:

sba.gov/blog/2018/2018-11/build-your-business-through-networking/

Federal Trade Commission, Endorsement Guides FAQ:

ftc.gov/business-guidance/resources/ftcs-endorsement-guides-what-people-are-asking

These are practical discussion tools, not guarantees of referrals or business outcomes. Respect privacy, obtain consent before sharing contact details, and follow applicable professional rules.