

# BENCHMARKING YOUR REFERABILITY: SELF EVALUATION & GOAL SETTING

When someone is referred to you, their next step is not to contact you. First, they're going to check you out, and if they like what they've found, if they're impressed, and your brand is sending the right message - then they'll reach out to you. Use the questions on this worksheet to determine the types of clients who are sending business your way, your goals for future referrals, and how well you're controlling your brand's image online.

## SELF EVALUATION



How do you normally go about getting referrals?



How many referrals have you gotten in the past year? How many of them turned into clients?



Think back on your last three referrals. Now trace those back to their source. What kind of relationship do you have with the source person/people?

## SELF EVALUATION (CONTINUED)



What are you currently doing that results in referrals? How has this changed in the past 5 years?

## SETTING YOUR GOALS



How many referrals would you like to have in the next year (365 days) and where might they come from?



Once you complete The Vetting Index on the next page, use this space to identify the key areas that you need to focus on to control the narrative from your brand that people vetting you are seeing.

# THE VETTING INDEX

## PASSING THE TEST YOU DON'T KNOW YOU'RE TAKING

Go through each category below and take a hard look at your brand in order to rate yourself on the scale from 1 to 5. For the digital presence questions, do a search for your brand in a private browsing window for unbiased results. Then, add up your score and see where you fall in the Vetting Index. After you've implemented and have been using some of the strategies from this book, re-test and see how you've improved.

Search for yourself the way a referral would - don't go past page one of results. To open a private browser window, use the keys shown on the right. Searching this way is critical because it takes your preferences and previously-visited sites out of the equation.



### RATING SCALE

1: Very Poor

2: Poor

3: OK

4: Good

5: Very Good

- » Are you doing business well and taking care of clients? \_\_\_\_\_
- » What is the state of your office? \_\_\_\_\_
- » How consistent is your branding on everything you use with clients? \_\_\_\_\_
- » How well does your staff epitomize your brand? \_\_\_\_\_
- » Do you have a well-designed website? \_\_\_\_\_
- » Does your website make it easy to get in touch with you (contact information listed in at least 2 places)? \_\_\_\_\_
- » Does your website share who you are and what you do accurately? \_\_\_\_\_
- » When you search for your brand online, how many times do you show up on page one of Google? (give yourself a 5 if it's more than 5 times) \_\_\_\_\_
- » On those page one results, how many of the results about you do you control? (give yourself a 5 if it's more than 5) \_\_\_\_\_

### BONUS ACTIVITY

Click on each item that shows up on page one of search results (both the ones you control and the ones you don't) and ask yourself the following questions: "If someone read what they found here and nothing else, would they..."

- » Know who I specialize in working with?
- » Know what services I specialize in?
- » Know what makes me different & great?
- » Know why they should choose to work with me?
- » Know how to get in touch with me?
- » Have an accurate depiction of where I am right now in my business?

### SCORING SCALE

**9-18:**

Brand needs work

**19-35:**

Okay, but room for improvement

**36-45:**

Excellent - keep up the great work!