Know who is actually sending you referrals

> *“People say they were referred but I have no idea by whom, so I never thank anyone.”*

Category: lead-management	**Setup Time:** ~20 minutes	**Estimated Hours Saved:** 1 hrs/week	**Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Add one required question at booking asking how they heard about you, and store the answer on the client record where you will actually see it again. Referrals are usually the largest source of new business and the least measured. Knowing who sends people lets you thank them by name, which costs nothing and is what produces the next referral.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Your booking system or intake form: (Free Tier / Wholesale)**
- **Google Forms: (Free Tier / Wholesale)**
- **Your CRM: (Free Tier / Wholesale)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Add one required question at booking or intake**
   'How did you hear about us?' with a free-text box. Required, or roughly half will skip it.

2. **Ask for a name, not just a category**
   'Referral' tells you nothing you can act on. 'Referred by — who?' gives you a person to thank.

3. **Put the answer on the client record**
   Not in a form response you never reopen. It should be visible the next time you look them up.

4. **Thank the referrer within the week**
   A message naming who they sent. This is the entire mechanism — recognition is what produces the second referral.

5. **Review the list monthly**
   Five minutes. You are looking for the handful of people who refer repeatedly, because they are worth treating differently.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Should I pay people for referrals?

A: Not at first, and in some regulated settings paying for patient referrals is restricted — check before you offer anything. Recognition alone works, and it never creates a compliance problem.

Q: What does this cost?

A: Nothing. It is a form field and a habit.

Q: What if people put vague answers?

A: Then the question is doing its job badly. Split it into a dropdown plus a name box rather than one open field.