

The 1% Referral and Testimonial Growth Model: Quick-Start Cheat Sheet

Creating Relationships that Drive Business — Apply-on-Monday Worksheet

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Questions or need help? I am your greatest supporter, email me at Conner@caffeinatedclosings.com or click here to [book a call](#).

What This Is:

A tactical guide to apply the two core fixes from my presentation — the proven path to unlock **exponential, referral-based growth** and **generate testimonials at scale starting tomorrow.**

**Remember, your clients
are strategic partners, not
just your customers!**



**“Every Client Interaction is an Opportunity to build a
relationship”**

“Your clients are already salespeople, so give them an experience to share!”

Once you’ve utilized all of your tools to provide more value and a better experience, move to set up referral systems!

1) Quick Diagnostic — Referrals vs. Churn (last 180 days)

Referrals In: _____ Clients Lost (Churn): _____ Ratio (Referrals ÷ Churn): _____

Interpretation: > 1.0 = Exponential path • ≈ 1.0 = Flat • < 1.0 = Treadmill/Ceiling.

Goal: Keep the ratio > 1.0 for 8 consecutive weeks. Re-measure every Friday.

2) Focus: Tweak Two Things

A) Client Experience • B) Referral Systems

A) Client Experience — Redefine Service • Be a Resource • Make Them the Hero

Anchor beliefs I taught:

- “If their first instinct isn’t to call you, you haven’t positioned yourself correctly.” (Become the hub.)
- Every time you’re a resource, a seed is planted.
- Don’t ask for business; earn it by being the person they think of first.

Experience Enhancers — choose three to deploy in the next 30 days

- Personalized welcome package (use their logo, not yours)
- Track & celebrate wins (promotions, awards, milestones)
- Birthdays/anniversaries list with automated sending
- Authentic share (e.g., music, coffee, hobby) in a thoughtful way
- Souvenirs/thank-yous when you travel
- Surprise-and-delight moment at a key stage in the engagement

Be a Resource — your connector map

List 8+ experts you connect people to if they ask for help (e.g., Legal, Title, Lenders, 1031, Appraisals, Notary, Marketing, Finance):

List 8+ categories you would like to be a resource for other people on:

Your pledge: “If you ever have a problem or need help, even when I’m not on the file, call me. I’ll help.”

Make the Client the Hero — ‘Bring them Business’ plan (next 14 days)

Education you’ll provide (lunch-and-learns, quick guides):

Introductions you’ll make (who ↔ who):

Co-marketing you’ll try (content swap, webinar, office visit):

3) Referral Systems

Set the Boundary at the Right Time (scripts)

New relationship: “Thanks for sharing what great service looks like to you. When we deliver exactly that on your next file, would you be open to referring me to one colleague? I’ll make it easy with a tiny template.”

Existing relationship: “I want to make sure the last closing was flawless. If we deliver that again on the next one, would you be open to referring me to one colleague?”

Top 5 Strategic Partners to Activate

Partner	Trigger (when to ask)	Asset (makes ask easy)	First Micro-Step	Owner	Due

Redefine 'Client' — Fit & Focus

A client is a strategic partner who refers consistently (trend ≥ 3). Not clients (yet): one-off favors, misaligned fits, accidental/passive referrers.

Sort your current book:

Clients (true partners)	Not Yet (what do they need?)

Boundaries & Value — 'More is Not Better'

Red flags I won't pursue:

Must-haves I will pursue:

5) BONUS — Google Review ‘Goldmine’ (5-minute call)

- Celebrate the moment the file closes (you or your designated ‘celebrator’).
- Ask: “Was everything excellent? Anything we could have done better?” Resolve issues fast.
- Make it easy: Ask for the review in their own words of praise.
- Send the direct review link by text/email while you’re on the phone.
- Have them tap the link now to confirm it opens, then tap ‘Write a review’ before you hang up.

Your review link (paste here): _____

Target: 80% success when the timing is right.

6) Weekly Scoreboard (review every Friday)

Referrals In	Churn	Ratio	Asks Made	Seeds Planted	Reviews

7) 7-Day & 30-Day Plan

This week (three concrete actions & calendar times):

1) _____ When: _____

2) _____ When: _____

3) _____ When: _____

By Day 30 (outcomes): _____

Keep this worksheet visible. Make one tiny move per day—the compounding comes from consistency.