

Customer Referral Program Template

The basic mechanics for turning happy customers into a repeatable source of new business.

Program Basics

Who's eligible to refer?: _____

Incentive for the referrer: _____

Incentive for the new customer: _____

When does the reward trigger?: _____

Making It Easy To Actually Use

☐ A simple way to make a referral (a link, a form, a specific person to email)

☐ Referral tracked from the moment it's made, not just when it converts

☐ Referrer gets a confirmation their referral was received

☐ Referrer gets notified when the reward is earned

When To Actually Ask

The best moment to ask is right after a customer expresses genuine satisfaction, not buried in a generic email blast. Identify 2–3 natural moments in your customer journey where this happens.

Simple Tracking Sheet

REFERRER	REFERRED CONTACT	DATE	STATUS	REWARD GIVEN?