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THE PRACTICAL WHITE PAPERS

Referrals: Design a journey worth recommending

Two journeys, one attribution rule, and a measurement system. This white paper helps you move from a reward promise to a truly actionable programme.

DECIDE. ALIGN. ACT.

Method, workshop and launch checklist

A working document for your next team workshop.

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Your working framework

- The referrer and the referred customer need separate journeys.
- The reward must depend on a verifiable event.
- The quality of the customers acquired is as important as their number.

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01 Define an acceptable referral.

Determine who can refer, who can become a referral, and what constitutes a new relationship. A prospect already in negotiations is not necessarily a new contact. Choose an attribution window compatible with your sales cycle and explain how competing referrals will be handled. The apparent simplicity of the message rests on this precise decision.

• Write the eligibility requirements and exclusions.

• Designate the authoritative source when two referrers claim the same referral.

02 Separate the two paths.

The referrer must understand what to share and when their reward will be validated. The referral must understand the offer without knowing the programme. Prefer a link that the referrer freely shares to an automated collection of addresses. Check the prospecting rules applicable to the channel and the audience; enrollment in the programme does not imply consent to all communications.

• Design two mobile paths: referral, then discovery and conversion.

• Have the informational messages and communication choices reviewed.

03 Define the point at which the reward is acquired

A quote request, a signature, and a first paid invoice do not have the same value. Choose a verifiable event and specify the time frame before validation. Describe the effects of cancellation or withdrawal where applicable. Avoid presenting as a given a benefit still subject to an important condition.

• Distinguish between the statuses: transmitted, received, in progress, validated, and canceled.

• Associate each status with a short explanation visible to the referrer.

04 Balance the offer and its cost

A reward for the referrer and an offer for the referred can reduce the awkwardness of the referral. Test their perceived value separately from the actual cost. In the budget, include the platform, management, delivery, and case processing. A high reward doesn't compensate for a poorly understood proposition or unsatisfactory service.

• Calculate a cost per validated new customer, including all items.

• Compare offers based on final conversion and the quality of acquired customers.

05 Prepare for ambiguous cases and fraud

Anticipate duplicates, expired links, canceled purchases, and self-referral attempts. Controls must be proportionate: a shared email address alone is not proof of fraud. Maintain a history of decisions and plan for human review of disputes. Don't make participants dependent on an opaque status.

• Create a decision matrix with reasons and responsible parties.

• Establish an appeal process, a response timeframe, and an audit log.

06 Connect the programme to the business cycle.

The CRM must transmit the event that validates the referral. Test the linking of the referral, the file, and the customer without unnecessarily recording data. A lost referral code should not result in a double payment during a correction. Periodically reconcile sales statuses and delivered rewards.

• Test an event sent twice, a merged file, and a late cancellation.

• Assign responsibility for discrepancies between the CRM and the platform.

07 Measure the referral down to its quality.

Track invitations, visits, eligible referrals, validated customers, and delivered rewards. Calculate each rate with a stable denominator. Also observe the retention or value of acquired customers over a comparable period. An increase in the number of shared links does not prove incremental acquisition or improved profitability.

- Compare total cost, conversion, and customer quality across cohorts.
- Decide on one adjustment at a time to understand its effect.

08 To prepare your communications

The rules depend in particular on the audience, the channel, and the existing relationship. Have your system assessed and consult the CNIL guidelines.

CNIL

09 Your referral programme planning workshop

Bring together the decision-makers, those who use the system, and a representative from the target audience. For each topic, document a decision, a responsible party, and the remaining issues to be resolved.

Subject	Work session	Expected deliverable
Promise	Define the benefits for the referrer and the referred customer separately.	Two messages consistent with real-world conditions.
Eligibility	Address known clients, competitor recommendations, and onboarding requirements.	A decision grid with the reason and the person responsible for validation.
Path	Link invitation, request, sales follow-up, and conversion.	A diagram of events, identifiers, and data visible by role.
Reward	Define the triggering event, the timeframe, and cancellations.	A traceable allocation process and a dispute resolution workflow.
Economics	Estimate the costs of the system and the number of customers ultimately validated.	A complete acquisition cost and an assessment of the quality of new clients.

10 Test scenarios to validate with your teams

• A recommendation is completed without interruption: each role finds its step and its benefit.

• A prospect is already a customer: the rule clearly distinguishes between ineligibility and a potential new opportunity.

• Two invitations arrive for the same person: the allocation rule is applied without double reward.

• A sale is canceled or validated late: the processing complies with the stated conditions.

• A communication preference changes: it is reflected in the relevant tools without improperly deleting the business file.

11 Develop the right link in the customer journey

Present the volume and conversion rate between each stage for the same cohort. A long callback time is a matter for sales organization; a misunderstanding of the offer is a matter for the messaging; a bonus not received is a matter for validation or distribution. Assign each improvement to a responsible party. Then measure its impact on the validated conversion rate and the total cost, allowing time for recent requests to be finalized.

Your next decision

Priority action:

Owner and review date:

Evidence required:

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