

Making More Effective Referrals

Tips on Referring Producers with Direct Marketing Questions to Appropriate Specialists

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To Accompany “Effectively Assisting Direct Marketing Producers: A Guide for Extension and Other Field Agents” by Dawn Thilmany. Both guides are on-line at www.swmarketingnetwork.org see “Resources for Agents”

A myriad of web, print, and media materials are available to assist direct marketing producers, but sometimes personal assistance is necessary. These tips are aimed at increasing the effectiveness and efficiency of the referral process for the producer, the referring agent, and the specialist to whom the referral is directed.

An effective and efficient referral is one that:

- gets the client the personal assistance that will help him or her the most,
- in the fewest number of steps (rather than a series of successive referrals),
- with the client having developed their business concept sufficiently to make best use of the specialist’s time.

Understanding Your Client’s Needs

The more you understand the producer’s marketing assistance needs the better.

- If you have the opportunity to follow the steps in the decision making guide, “Effectively Assisting Direct Marketing Producers,” even if you end up just giving a referral, you will understand their needs much better.
- Good overviews of basic direct marketing topics are available free from ATTRA at www.attra.org Some of the most useful overviews are on direct marketing, value-added processing, business planning, and evaluating a rural enterprise. They have scores of additional publications on more specific topics.
- The “Marketing Topics” section of the Southwest Marketing Network website www.swmarketingnetwork.org has resources for nearly 40 marketing topics with a focus on the Four Corners states.

Helping the Client Be Prepared

If you can prompt the producer that you refer to a specialist to be prepared to answer some of the specialist’s basic questions, you will be setting up a more effective and efficient process.

1. Generally, as seen in Dawn Thilmany's Guide, the producers should have at least begun to determine:
 - What product or service they hope to market.
 - Who are the target customers and how they plan to reach them.
 - The geographic scope and area of their intended market.
2. Personal assistance is intended to augment, not replace, the understanding that most producers can gain from web, print, and other media resources. In other words, prompt them to do their homework before they contact the specialist you are sending them to. For example, if they know they want to start a CSA, they should read the ATTRA publication, or something similar, on that topic.

As mentioned above, the ATTRA and the Southwest Marketing Network websites are good places to start. Be sure to direct your clients to specific resources, rather than full websites since the volume of information available may overwhelm them. Part of your successful referral is knowing the types of content that the specialists you refer to, prefer in terms of style, approach, or consistency with their models of marketing research and market plan development.

The Immediate Referral

Sometimes an agent or other professional does not have the time or ability to engage the caller to any significant extent. If an immediate referral is necessary, a little preparation can make it more effective.

It's not uncommon to have the "go to" person in your rolodex who can or "should be able" to handle all those marketing calls you can't address — the one-stop shop that allows you to get back to your "real work." If so, you are fortunate. But, to avoid abusing that relationship and to better serve your clients, it's good to get to know that specialist, what they can best assist with, and who they refer to. A short discussion may suffice. With that information in hand, you will know what questions to send their way, and hopefully a few of their colleagues who can assist with other questions. You may well end up with a short list of experts, rather than just one, for your quick referrals — and better able to assist those who call you for help.