

SOI AUDIT & REFERRAL PLANNER

Past-Client Activation System



PART 1: DATABASE AUDIT

List every past client and warm contact you can recall. Use your phone contacts, email history, and CRM as sources. Goal: 100+ contacts.

#	Full Name	Relationship	Last Contact	Transaction?	Tier (A/B/C)
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					

Tier A = Past clients who referred or said they would. Tier B = Know you well, haven't transacted. Tier C = Know of you, need re-warming.

PART 2: CONTACT SEGMENTATION TOTALS

Tier	Description	Count	Contact Frequency
A – Champions	Active referrers, past clients who sang your praises		Monthly – treat as VIPs
B – Warm Circle	Know you well, trust you, haven't transacted yet		Every 4–6 weeks
C – Reactivation	Haven't engaged recently, need a reason to reconnect		Quarterly check-ins

PART 3: 12-MONTH TOUCHPOINT CALENDAR

Map your planned touchpoints for each month. Aim for value-first contact. Mark referral-ask moments with

MONTH	TOUCHPOINT / ACTIVITY	TIER TARGET	REFERRAL ASK?
Jan			
Feb			
Mar			
Apr			
May			
Jun			
Jul			
Aug			
Sep			
Oct			
Nov			

Dec			
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