

Refer-A-Friend Campaign

Please Note! We recommend using the online [Strategy Guide](#) to source your campaigns. The [Strategy Guide](#) is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Refer a Friend campaign that you can download for free from the Infusionsoft Marketplace.

This campaign asks someone to refer a friend by providing the friend's name and phone number. Once the referral has been submitted, a follow up task is created to reach out to the new lead.

1. Download the [Refer a Friend](#) campaign from the Marketplace
2. Assign the Follow Up Task

The only thing to configure for this campaign is who will be tasked with contacting the newly referred lead.

1. Double click on the Task to Call New Referral sequence.
2. Double click on the New Referral Call task.
3. Select a user from the Assign to (backup) dropdown.
4. In the upper right of the page, click Draft to change the task to the Ready status.
5. Click on Back to Sequence in the upper left of the page.
6. In the upper right of the page, click Draft to mark the sequence itself as Ready!
7. Click Back to Campaign in the upper left of the page.

3. Publish the Campaign

All items on this campaign by now should look light green/greyed out (like the *Start Refer a Friend goal). This means we can safely Publish.

1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Start Asking for Referrals

This campaign can be triggered automatically or manually.

To automatically trigger this campaign:

1. Navigate to another campaign you want to use with this referral request
2. Open the sequence of the campaign where you want someone to start the nurture
3. At the appropriate point in the sequence flow, add a Tag step that applies the Functional -> Start Refer a Friend tag.
4. Re-publish that campaign so the next time a contact reaches that point in the sequence, the tag will automatically ask for a referral.

5. To manually trigger this campaign for an individual customer:

1. Apply the Start Refer a Friend Note template to someone's contact record.

6. To manually trigger this campaign for a group of customers:

1. Do a contact search for the segment of your customers you want to ask for a referral.
 2. When you have the segment you want, from the Actions dropdown in the upper left of the search results, select Apply/Remove Tag
 3. Apply the Functional -> Start Refer a Friend tag
 4. Process the action
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