The Referral Scorecard

Most referral advice tells you what to do. Almost none of it tells you whether you actually did it. This scorecard tracks both halves — the work you put in, and the business that came back — so referrals stop being something that happens to you and start being something you run.

WHY TRACK INPUTS AND OUTPUTS SEPARATELY

Referral business lags. The conversation you have in March becomes a closing in September, which means judging yourself by referrals received this month tells you almost nothing about whether you're doing the work. Inputs tell you if you're building. Outputs tell you what you built six months ago. You need both on one page to see the truth — and to keep going during the quiet stretch before it pays.

01 Print one for each month

Page two is the monthly scorecard. Print twelve, or one at a time. Keep it somewhere you'll see it — beside your planner, not in a folder.

02 Mark it as you go, not at month-end

Fill a tally box the moment the action happens. Reconstructing a month from memory produces a fiction that feels productive. Marking in real time produces a number you can trust.

03 Set your own goals in the goal column

The goal column is blank on purpose — your Top 50 and your market are yours. If you're starting out, pick numbers you'll actually hit:

- A realistic first month is **every Top 50 name touched once**, a handful of past-client check-ins, and two partner conversations.
- Raise the numbers only after you've hit them twice. A goal you miss every month stops meaning anything.

04 Review the quarter on page three

Every three months, roll your numbers up and look at the trend rather than the month. Referral work is judged in quarters, not weeks.

THE STANDARD THIS SCORECARD WORKS TOWARD

Solo Agent Academy's planning standard is that
HALF YOUR CLOSINGS COME FROM RELATIONSHIP BUSINESS
— repeat clients and referrals combined — with a 60/40 split favoring listings. That's the destination this scorecard is pointed at.

This is an SAA planning standard used for goal-setting, not an industry statistic. Your own ratio will depend on your market, your tenure, and how long you've been doing this work.

SOLO AGENT ACADEMY

Referral Scorecard

MONTH & YEAR ....

PART ONE — The Work You Put In

You control these

Fill a box each time it happens. Write your goal at the left before the month starts.

ACTION	GOAL	TALLY	TOTAL
Top 50 personal touches A real conversation, note, or message — not a mass email			
Past client check-ins People you've closed with, contacted with no ask attached			
Business partner touches Lender, title, inspector, trades — including business you sent them			
Agent-to-agent connections Other agents who now know your name and your focus			
Community appearances Showing up where you'd go anyway — visible, not selling			
Referral one-pagers handed out Given to someone who already trusts you			
Introductions asked for A specific, comfortable ask — not a mass “send me referrals”			

PART TWO — What Came Back

These lag — be patient

The result of work you did months ago. Record it, don't judge this month by it.

RESULT	SELLERS	BUYERS	TOTAL
Referrals received			
Appointments from referrals			
Agreements signed from referrals			
Closings from referrals or repeat clients			
Referrals I gave to others Partners, agents in other markets, trades			

Your relationship share this month

Closings from referrals and repeat clients, divided by your total closings.

RELATIONSHIP ÷ ALL CLOSINGS = MY SHARE

SAA planning standard: 50% of closings from relationship business, 60/40 favoring listings.

Referrals come from trust and visibility. Both need a rhythm.

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Quarterly Referral Review

QUARTER & YEAR

ROLL-UP Three Months at a Glance

Trend beats any single month

Copy your monthly totals across. You're looking for direction, not perfection.

MEASURE	MONTH 1	MONTH 2	MONTH 3	QUARTER
Top 50 personal touches				
Past client check-ins				
Business partner touches				
Agent-to-agent connections				
One-pagers handed out				
Referrals received				
Closings from relationships				

Four questions worth answering honestly

Which gear got the most attention this quarter — and which one did I quietly avoid?

Where did my referrals actually come from? Is it the source I assumed?

Who in my Top 50 still doesn't know what I do, or how to send someone my way?

What one input am I committing to raise next quarter — and by how much?

You can't build local authority if you're not referrable.