

REFERRAL ACTIVITY

Tools > Reports > Clients > Referral Activity

The Referral Activity Breakdown displays the number of clients gained from each referral method, providing you with insight into how people are hearing about your business. A referral is considered to have occurred when a client's first visit date falls within the given time frame. The report includes a count of referrals as well as the total value of clients referred via each method. Totals are also displayed for the entire database as a reference to determine how much each referral method has generated for the business. This report will assist you in tracking the success of your referral methods, which may assist you in developing marketing strategies targeted at bringing in new clients.

% OF REVENUE DUE TO REFERRALS


The percentage of total revenue that was gained from all referral methods outside of client referrals.

% OF REVENUE DUE TO CLIENT REFERRALS

The percentage of total revenue that was gained from client referrals.

TOTAL

This section displays the total counts and values for all referral methods. Figures are shown for the specified date range and the entire database.

| Referral Activity Breakdown | | | | | |
|--|------------|--------------------|---------------|---|--|
| From: Monday, 23 November, 2015 | | | |  | |
| To: Monday, 11 January, 2016 | | | | Peppermint Park | |
| Time Period: 50 Days (7.1 Weeks) | | | | | |
| Referral Method | For Period | | All Referrals | | |
| | Count | Value | Count | Value | |
| Facebook | 0 | \$0.00 | 2 | \$141.50 | |
| Friend or Family Member | 12 | \$3,191.00 | 22 | \$16,707.00 | |
| Promotion | 11 | \$2,032.95 | 22 | \$9,675.82 | |
| Search Engine | 22 | \$7,582.40 | 40 | \$22,873.31 | |
| Walking Past | 5 | \$1,008.95 | 5 | \$1,646.95 | |
| Website | 9 | \$1,961.35 | 21 | \$11,838.35 | |
| Word of mouth | 10 | \$3,959.45 | 22 | \$16,651.90 | |
| Total for Referral Methods | 69 | \$19,736.10 | 134 | \$79,534.83 | |
| Client Referrals | 2 | \$554.40 | 13 | \$4,899.67 | |
| No Referral Specified | 2 | \$614.92 | 27 | \$6,713.92 | |
| Total | 73 | \$20,905.42 | 174 | \$91,148.42 | |
| Percentage of Revenue due to Referrals | | 94.41% | 87.26% | | |
| Percentage of Revenue due to Client Referrals | | 2.65% | 5.38% | | |

* NOTE: A Referral is considered to have occurred within a period if the clients First Visit Date is in the period of the report.

FOR PERIOD

This section shows data for new clients who visited within the given date range.

ALL REFERRALS

This section displays data for all dates within the database.

COUNT

The number of new clients gained from this referral method.

TOTAL FOR ALL REFERRAL METHODS

The totals for all referral methods listed above this section. This excludes client referrals and clients with no specified referral method.

VALUE

The amount of revenue gained from clients referred by this method.

NO REFERRAL SPECIFIED

This section refers to clients whose referral method was not specified.

CLIENT REFERRALS

This section displays the number and value of clients who were referred directly by another client in the database.