

CLIENT REFERRING PROCESS

Ops is made aware of a client referral

Emails Marketing

In SF, Marketing marks:

- The client as a VIP
- The # of referrals in the calendar year
- The # of referrals total
- The type of gift sent

Marketing sends the client:

- A personalized, Capita branded card, electronically signed by the advisor
- A gift

It does **NOT** matter if the referral becomes a client or not, we still send them a card & gift.

1-2 Referrals: The client receives cookies

3+ Referrals: Edible arrangements, Love Utah Box, or another gift upon Kaitlin's decision.

To make a client a VIP for the current year, the deadline is **November 1st.**

VIPs get a big thank you gift around Christmas time: Past year's have been a Love Utah box, Cold Case Ice Cream, etc.

Other gifts clients are getting:

Upon onboarding: Brownies

On their 1st, 5th, and 10th Anniversaries: Caramels
(Handled by Ops)

