

Check Referral Readiness

Allow 20-30 minutes. Practice with fictional clients if needed.

Your name / service / date:

1. Which project was accepted, and what feedback did you receive?

2. Is a referral request relevant and welcome? Why?

3. Service description and portfolio link the client can forward:

Write Relevant Messages

Make requests optional. Use preferred channels and respect platform rules.

4. Draft one polite referral request:

5. Draft a repeat-work offer with scope, price and timing:

6. Draft a helpful check-in that fits the client business cycle:

7. What will you do if the client declines or asks you to stop?

Build a Relationship Tracker

Limit access. Avoid passwords and unnecessary sensitive information.

8. Client / project / actual feedback / possible repeat need:

9. Contact preference / next action / agreed date:

10. Referral status / outcome / next step:

11. How will you separate leads, booked work and received income?

Review and Continue to Module 5

Referrals are optional. Keep developing other client-finding channels.

12. This month: requests, introductions, repeat offers and outcomes:

Monthly review checklist

- ☐ Check acceptance and actual feedback before asking.
- ☐ Respect contact preferences and requests to stop.
- ☐ Get permission before sharing client details or work.
- ☐ Confirm new project scope, timing and payment terms.
- ☐ Track introductions separately from booked projects.
- ☐ Review time, costs and whether repeat work is profitable.
- ☐ Choose one other channel for finding suitable clients.

One action to complete within the next 7 days:

Next: Module 5 - Lesson 34: Multiple Freelance Income Streams

<https://moneyonlineers.com/building-multiple-freelance-income-streams/>