



COMMUNICATION TEMPLATES

Client referral request template

A low-pressure referral request template that asks at the right moment, gives clients useful language, and protects the relationship.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A successful client engagement has reached a positive close.

WORK THROUGH THE CHECKLIST

☐ 01 **Choose the right moment**

☐ 02 **Thank the client specifically**

☐ 03 **State who you help**

☐ 04 **Make the ask optional**

☐ 05 **Offer simple language**

☐ 06 **Record the outcome**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.