

Build your client list with this referral letter template

What's the single most important step you can take to build your client list? **Introduce yourself to other clinicians and let them know you seek referrals.** It only takes a few minutes to create and send a referral letter, yet doing so can pay dividends in the long-run.

Why is a **referral letter** important? It advertises your services in a concise and non-intrusive manner to other clinicians who often serve as gatekeepers to potential clients for your business. Clinicians on the receiving end often appreciate the correspondence because they may not have a solid network of specialists to whom they can refer. It's a win-win scenario. You gain potential clients, and other clinicians gain a trusted provider to whom they can send patients when needed—all with minimal time and effort.

To whom should you send the letter? **Target other clinicians in your local area.** Clients often follow through with referrals when a provider's practice is located close to their home or job. This is especially true when clients seek physical therapy, speech therapy, substance abuse counseling, nutritional counseling, or other services that require frequent appointments.

Think about the types of clinicians who treat the same clients that you do. For example, if you're a therapist who treats many individuals with Crohn's disease, send your referral letter to local primary care physicians and gastroenterologists. If you're a therapist who specializes in eating disorders, send your letter to local dietitians and nutritionists. If you're an acupuncturist, contact local obstetricians or massage therapists. If you're a speech-language pathologist who works primarily with children, reach out to local pediatricians.

Once you've identified the types of clinicians you want to contact, consider these strategies to compile names and addresses:

- **Search Yelp.** Input your zip code and search for specific types of clinicians in your local area.
- **Perform a Google search.** Google the type of clinician you want to target in your zip code or surrounding areas. These searches often yield directories of clinicians that you can also use to build your list.
- **Look on payer websites.** If you're in network with a health insurance provider, you'll be able to search for other clinicians in your same zip code.

CUSTOMIZE THIS TEMPLATE FOR YOUR LETTER

Next, write the letter. Just copy the following template, and edit it based on your services and the type of clients you see.

[Your address]

[Date]

[Name of the clinician to whom you're writing]

[Clinician's address]

Dear [Clinician's name]:

My name is [your full name and credentials], and I'm a [your specialty/provider type] who provides [types of services you offer] to a variety of clients. I specialize in [indicate your specialty if you have one]. I practice within a few miles of your office, making it easy for your patients to access my services. I'm currently paneled with the following payers: [list of payers]. I would greatly appreciate any referrals, and I have enclosed several business cards for your reference.

I'm also happy to stop by your office or chat via phone to tell you more about my services and background. Please contact me at [your phone number].

I look forward to our continued collaboration.

Sincerely,

[Your signature]

[Your printed name and credentials]

OTHER TIPS TO CONSIDER

Consider the following other tips when using a referral letter:

1. **Keep it brief.** Even if you don't follow the above template verbatim, be sure to keep the body of your letter as short as possible. Clinicians are busy, and they're more likely to respond favorably to letters that are succinct and straightforward.
2. **Track referral sources.** During the registration or intake process, ask your new patients to provide the name of the individual/clinician who referred them to your practice. This will help you track referral patterns and give you a sense of what efforts pay off the most.
3. **Thank referring clinicians.** Send a short thank-you letter to any clinician who refers a patient to your practice. Don't mention the patient's name. Simply write the following: 'Our practice recently saw a patient you referred to us. Thank you so much for the referral.'