Persona-Based Checklist for Referral Growth

This checklist is a practical, repeatable tool to help sales representatives plan smarter, more effective referral meetings. Use it to tailor your prep by persona, clarify what success looks like, anticipate common challenges, align with motivators, and ensure consistent follow-up.

Step 1: Define Your Target Personas

A persona is a defined customer profile, including their characteristics, success measures, and challenges.

Follow this example template to outline each persona you may encounter in the field.

SETTING: Home Health　　**ROLE/TITLE:** Physician

RESPONSIBILITIES	SUCCESS MEASURES	CHALLENGES	MOTIVATORS
• Diagnosing and treating patients • Providing preventive care • Managing chronic conditions	• Revenue - maximize patient visits • Hospitalizations • Patient Satisfaction • Patient outcomes	• Not enough time • Lack of coordination with hospitalists • Staffing	• Data • Ease of use • Time saving • Staff satisfaction • Patient satisfaction • Increased revenue

Step 2: Pre-Meeting Prep Checklist

Preparation sets the tone for success. Use this checklist to clarify your goals, tailor your message by persona, and enter every referral meeting with the right insights and proof points at your fingertips.

- [ ] **Define the outcome: clarify the one result you want to achieve (e.g., secure trial referral, book joint patient review).**
- [ ] **Review your target persona (outlined above): understand their responsibilities, success measures, challenges, and motivators.**
- [ ] **Research account trends: analyze key metrics such as referral activity, payer mix, outcomes, and competitive benchmarks to support your message.**
- [ ] **Confirm agency capacity and program updates: check your organization's current openings, specialties, service areas, and new initiatives.**
- [ ] **Prepare value points: outline persona-specific messaging and back it with proof (charts, benchmarks, outcomes, testimonials).**
- [ ] **Draft discovery questions: create prompts to validate assumptions and uncover additional pain points.**
- [ ] **Anticipate objections: plan responses to common pushbacks (e.g., "we already have a preferred provider").**

Step 3: During the Meeting Checklist

Your time with referral partners is limited — make it count. Follow this guide to build rapport, ask the right questions, align your value to their needs, and leave with clear, agreed-upon next steps.

- [ ] **Open with rapport: acknowledge something personal or relevant (recent initiative, patient story, or shared challenge).**
- [ ] **Confirm the agenda: set expectations for timing and desired outcome.**
- [ ] **Ask discovery questions: uncover challenges, goals, and motivators (validate or update assumptions).**
- [ ] **Listen actively and take notes: capture pain points, needs, and referral trends in their words.**
- [ ] **Present tailored value points: align your solutions to their persona-specific goals, supported by proof (data, benchmarks, stories).**
- [ ] **Check for alignment: confirm your solution matches their priorities.**
- [ ] **Handle objections confidently: be prepared with responses to common pushbacks.**
- [ ] **Reinforce key benefits: tie back to what matters most (outcomes, efficiency, patient experience, financials).**
- [ ] **Agree on next steps: clarify actions, responsibilities, and timing before wrapping up.**

TIP

For Trella's Marketspace Insights customers, you can leverage the Sales Spotlight feature to help build your talk track with data-driven messaging.

Not a Trella customer?
Request a FREE Sales Spotlight report sample.

REQUEST MY SAMPLE >>

Hospitalization Rate within 30 days from Start of Care
At **14.72%** PLEASANT VALLEY CARE, INC's Hospitalization Rate is **2.52% lower** than SUNSHINE CARE, INC's value of **17.24%**.

Total Patient Cost Following HHA (12-month Risk Adjusted)
At **$35,090** PLEASANT VALLEY CARE, INC's Total Patient Cost is **20.86% lower** than SUNSHINE CARE, INC's value of **$44,337**.

6-month Risk Adjusted Total Cost of Care following Home Health
At **$18,882** PLEASANT VALLEY CARE, INC's Cost of Care is **7% lower** than SUNSHINE CARE, INC's value of **$20,315**.

Trella HEALTH

Step 4: After the Meeting Checklist

The real growth happens in the follow-through. Use this checklist to log insights, share updates with teams, reinforce care coordination, and keep momentum by planning your next touchpoint.

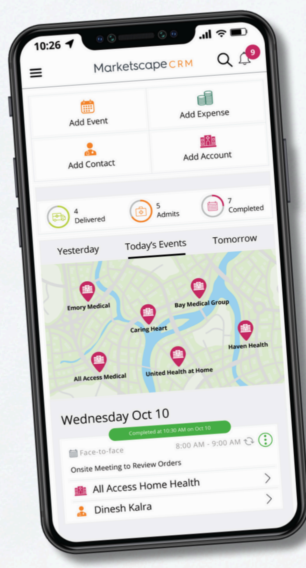
- **Log meeting notes and activity in your CRM: capture key discussion points, decisions, and next steps in your CRM.**
- **Send a follow-up: share a thank-you message with a recap of the conversation and any promised materials.**
- **Schedule the next touchpoint: set a date for your next call, visit, or check-in.**
- **Share internal updates: brief your team on outcomes, opportunities, or risks uncovered in the meeting.**
- **Reinforce communication with care teams: ensure intake, clinical staff, and liaisons are aligned on patient needs, referral details, and next steps.**
- **Reflect on performance: note what worked well, what could be improved, and adjust your approach for future meetings.**

TIP

Use Trella's mobile-first CRM to log notes, track follow-ups, and set reminders so every referral conversation turns into measurable growth.

Not using Trella's CRM?
Request a demo and never miss a next step.

REQUEST A DEMO >>



Let us show you how we can help your business grow.

Trella Health can help you improve sales productivity, identify new referral sources, and benchmark your performance.

GET STARTED >>