



# Refer a friend Checklist

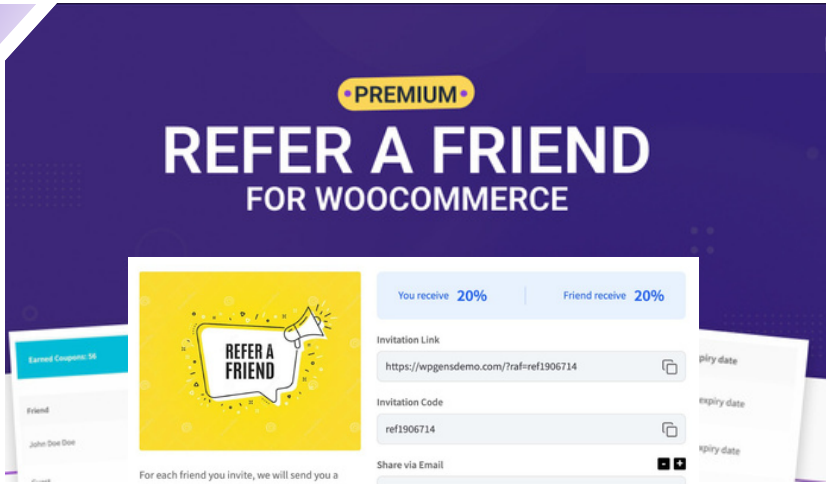
Elevate your sales



**Woo** COMMERCE



# Checklist Introduction



Refer a Friend for WooCommerce PREMIUM is a powerful plugin designed to boost sales through word-of-mouth marketing. It enables customers to refer friends and family to your store, rewarding both the advocate and their friend with discounts or other incentives.

The plugin is easy to set up, customizable, and integrates seamlessly with WooCommerce, making it a valuable tool for increasing customer engagement and driving sales growth.

Whether you're new to referral marketing or looking to refine your existing program, this guide is designed to provide you with everything you need to know. From setting up basic options to using advanced features, it will help you build a successful and fraud-proof referral program.

# Refer a friend Checklist

- Enable referral codes**

Allow advocates to use referral codes alongside links. These codes can function as coupons, making it easier for customers to share both in person and via messaging apps.
- Enable links for guest customers**

Enable referral links for guest customers, allowing them to share without the need to register. This can significantly expand your program's reach by including all visitors.
- Display program to customers without orders**

Keep the referral link visible for customers who haven't made a purchase yet. This can increase the number of referrals by allowing new customers to advocate even before completing a purchase.
- Set cookie duration (e.g., 30 days)**

Determine how long the referral tracking cookie will remain active. A longer period, such as 30 days, increases the chances of earning rewards from referred friends. Be sure to promote this duration on your landing page to inform customers.
- Set minimum referral order to 0**

Setting this option to zero ensures that any purchase qualifies for the referral reward. This simplifies the program and encourages more conversions from referrals.
- Set up Friend reward**
  - Ensure that the referred friend receives a reward on their first order. This strategy motivates new customers to purchase and helps convert referrals into actual sales.

# Refer a friend Checklist

## Set up Advocate reward

- When creating Advocate rewards, determine whether a percentage-based reward or a fixed amount will be more attractive to your customers.
- A minimum of 10% is generally attractive, especially for SaaS and subscription services, as it aligns with scaling monthly or annual fees.
- On the other hand, e-commerce stores might lean toward fixed rewards (\$5-\$20) for simplicity, particularly when selling low- to mid-priced products.
- Ultimately, use incentives that effectively motivate advocates to drive referrals and enhance customer engagement.

## Use a modern design

Opt for a compact, modern design for your referral program. A streamlined appearance can improve conversion rates by creating a more user-friendly experience.

## Use concise description text

Keep any explanatory text short and to the point. Shorter descriptions tend to be read more often, maintaining the customers' interest and driving action.

## Create a dedicated page for referral links

Create a specific landing page for those arriving via referral links, or direct them to a high-value page like your store's homepage or a key product. This ensures customers are guided to relevant content upon arrival.

## Show referral program on product pages

Display referral options on product pages to maximize visibility and ease of access for customers who want to share your products directly.

# Refer a friend Checklist

## Display referral program on Thank you page

- To encourage referral activity, present the referral link and sharing options in a modal on the Thank You page. If this is not a high priority for your store, include the referral link as text below the order details.
- For an example of this layout, follow [this link](#).

## Maximize reach across multiple platforms

- Enable sharing on various social media channels to expand your referral program's reach.
- Facebook and Instagram are generally the most effective platforms for consumer referral programs.
- If you're targeting a younger audience, TikTok is gaining popularity quickly and is a strong contender for creative referral strategies.

## Use clear messaging in referral share emails

- Ensure your messaging is concise and includes personalization placeholders, such as `{{name}}` or `{{friend_name}}`.
- Short and direct communication is more engaging and effective, encouraging recipients to take action.

## Activate referral program reminder email

- Send a reminder email to advocates about their referrals after their first order. A suitable delay for this reminder is 1-2 weeks post-order.
- NOTE: This email will be sent only once per customer, specifically after their first order.

## Build an effective referral program landing page

- Build a dedicated landing page for your referral program using the plugin's advanced shortcode. This page should clearly outline the benefits of the referral program and include convenient sharing options for customers.
- To learn how to create this page, follow [this link](#).

# Refer a friend Checklist

## Link landing page in the footer menu

Add the referral landing page to your website's footer menu for easy access. This encourages participation from visitors even after their initial visit.

## Automatically apply active coupons

- Use a code snippet to automatically apply coupons for customers who have referred friends. This streamlines the checkout process and ensures that rewards are received immediately.
- To learn how to add this feature to your referral program, follow [this link](#).

## Integrate referral program with Klaviyo

- Connect your referral program to Klaviyo to unlock advanced email marketing capabilities.
- To learn how to add this feature to your referral program, follow [this link](#).

## Add a referral link to the order confirmation email

Include the referral link in the order confirmation emails to remind customers about the program. This makes it easy for them to share right after their purchase, encouraging immediate participation.

# Troubleshooting and Support

To help you make the most of the Refer a Friend for WooCommerce PREMIUM plugin, we offer a range of additional resources:

## Documentation

For detailed setup instructions and configuration guidance, visit our comprehensive documentation. It covers everything from basic installation to advanced configuration options.

## FAQ

Access our Frequently Asked Questions section to find quick answers to common queries. This resource is designed to address common issues and provide straightforward solutions.

## Blog

Explore our blog for in-depth articles, updates, and tips on maximizing your use of the plugin and enhancing your referral program. Our blog covers various topics, from plugin features to industry best practices.

## Support

If you can't find an answer within our documentation and require assistance from our team, please use our on-site live chat. For non-urgent inquiries, you can reach out using our [Contact Us](#) form.