



BUFFINI & COMPANY

**REFERRALMAKER** | CRM

Run Your  
Business  
**Like a  
Business.**



# Stop Chasing Leads. Start Making Money.



Referral Maker® CRM is an award-winning customer relationship management tool that makes running a profitable business easy!

## ✓ Powerful.

Generate a high-quality, steady stream of referrals from people you want to work with.

## ✓ Smart.

Get personalized action steps created for you based on the financial goals you set.

## ✓ Focused.

Upload your contacts and rank your relationships.

## ✓ Simple.

Always know who to contact, when to contact them and what to say.

## Add Video Messaging\*

powered by  BombBomb

\*Watch your business grow with this personal touch. This add-on is available to all levels of Membership.





## Do What You Love. Work With Clients.

Get up and running quickly, stay organized and manage your time better with our simple-to-use platform.

- ✓ Your personalized dashboard shows you how to reach your goals.
- ✓ Prioritize your day by setting appointments on your calendar and following up on tasks with your to-do list.
- ✓ Use the Work by Referral system as the foundation for your business plan so you can put your lead generation on autopilot.

# Lead Generation in the Palm of Your Hand

Our intuitive app puts your entire database on your mobile device so you stay connected to the people who want to refer to you.

- ✓ Access your contacts, calendar and daily action plan on the go.
- ✓ Integrates with your phone's contact list so you can make calls and send messages or videos right from the app.
- ✓ Mapping technology lets you know who's around so that you can pop-by clients in the area.



# Our System Explained

The Work by Referral system utilizes calls, notes and Pop-Bys along with direct mail, email, video messaging, eReports and targeted dialogues to help you create a predictable stream of high-quality leads.

By keeping track of your activities and learning to serve your clients they will always want to refer business to you.

## Daily Activities\*

- ✓ Phone Calls 
- ✓ Handwritten Notes 
- ✓ Pop-Bys 
- ✓ Direct Mail 
- ✓ Email and eReports 
- ✓ Targeted Dialogues 

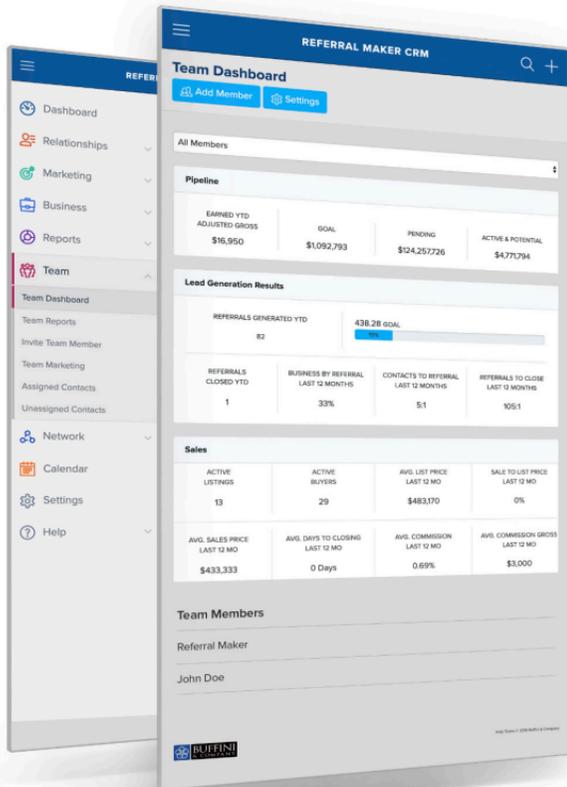
**= HIGH QUALITY LEADS**

\*This is a sample of tasks that appear on your personal dashboard.

# Referral Maker<sup>®</sup> CRM | Team

Get powerful insights about your entire team's business performance.

- ✓ One-click access to your sales, leads and pipeline.
- ✓ Instant feedback on how your leads are converting.
- ✓ Assign leads to your team and watch how they progress through the pipeline to generate results.
- ✓ Real-time data and comprehensive reports on team performance.





*“Referral Maker® CRM is so easy to use. It shows what interactions I’ve had with clients and suggests interactions if I haven’t touched base with them in a while.”*

**– Yolanda Kruger, Weed, CA**

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*“Referral Maker CRM tells you everything you need to do to be successful in your business! The simplest CRM and in a real sense, ‘relationship management’ system.”*

**– Robert Contrera, Port Orchard, WA**

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*“I use Referral Maker CRM daily. It’s my go-to every single day to see what I need to do, who I need to contact and where I’m at in terms of active, closed and pending sales. It’s also where I gauge what other referrals, I can take on at that point.”*

**– Elizabeth Davidson, Tualatin, OR**



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# Sign Up Today!

**1-800-945-3485 x2**

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Get a  
30-Day  
Free Trial

