

Referral Request Email Template

Everything you need to ask a happy web design client for a referral: the request email, a line for the handover call, a reply when they can't think of anyone, a note they can forward, a thank-you and one short follow-up. Fill in every [bracket] and delete the guidance in italics. Works in Google Docs, Word, Notion or any email client.

1. Before you send: four rules

These are our habits, not laws. Where the FTC is mentioned, it is a US source; the sources are at the bottom of this page.

- **Ask after the win.** The site is live, the final invoice is paid and the client has said thanks. We wouldn't ask while a balance is open.
 - **Name who you want.** "Know anyone?" is hard to answer. "A local owner whose site feels dated" is easy to picture.
 - **One email, one ask.** Don't add an upsell, and don't add a review or testimonial request. Send that as its own email; it has its own rules.
 - **Skip the reward, and say thanks after.** The FTC's CAN-SPAM guide says that if a seller offers money, discounts or the like in exchange for forwarding a message, the seller may be responsible for compliance. The FTC's Endorsement Guides (16 CFR 255.5) say a connection that might materially affect the weight or credibility of an endorsement may need to be disclosed; the Guides define an endorsement as an advertising, marketing or promotional message (16 CFR 255.0(b)), so a private introduction may differ, which is one more reason to check. A recommendation you paid for is worth less; that is our view. Check your local rules before you offer anything.
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2. The request email

Send it to one client at a time, once the final invoice is paid. It says who you want, gives them a note to forward and makes a no easy.

Subject: Who else could I help, [Dana]?

Hi [Client first name],

[Harbor Dental]'s site has been live [five weeks]. Know a local owner whose site feels dated?

Here's a note you can forward: [the note from section 4]

No worries if no one comes to mind.

[Your name]

Before you send, check: it names the kind of owner you want; the note is attached or pasted in; there is no discount or gift attached; there is no review request in it; it says a no is fine.

3. The handover-call line

If the handover call is the natural moment, ask out loud. Ask for an introduction, not a list of names.

"Glad it's live. If another owner with a dated site comes to mind, I'd love an introduction. No pressure either way."

If you normally talk to this client by text, a short text works too: "Hi [Dana], the site's been live [five weeks]. Know a local owner with a dated site? Happy to be introduced. No pressure!"

4. The note they can forward

Written in the client's voice, so they can change every word. They make the introduction themselves; you never email a stranger cold.

Hi [Sam], [Maya] rebuilt our site, and I thought of you. Want me to introduce you? Reply and I will.

Tell the client they can change it, or ignore it and write their own.

5. The reply when they can't think of anyone

"No problem at all. If someone comes up, just forward my note. Thanks for trusting me with the site."

6. The thank-you (send it the same day, whether or not it turns into work)

Hi [Dana], thank you for thinking of [Sam]. I'll let you know how it goes.

A thank-you is a thank-you. If you plan any reward, check your local rules first.

7. One follow-up, then let it go

Send it about a week after the first email. That timing is a suggestion, not a rule. If there's still no reply, stop.

Subject: Re: Who else could I help, [Dana]?

Hi [Dana], a quick nudge in case this got buried. No worries at all if no one comes to mind. Thanks again for the work on the site.

[Your name]

8. Checklist before you send

- ☐ The site is live and the final invoice is paid
 - ☐ I name the kind of owner I'd like to meet
 - ☐ The note to forward is included
 - ☐ There is no discount, gift or reward attached
 - ☐ There is no review or testimonial request in this email
 - ☐ A no is easy to give
 - ☐ I'll send one follow-up, then stop
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9. Remembering to ask (add to your launch checklist)

The day you send the final invoice, put the ask in your calendar for [two weeks later] and send section 2 then, if the invoice is paid.

Launching a lot of sites? In Workspace369 you can record where each client came from (lead sources are on Voyager, the next plan up from Cadet, the entry plan). You still write the email yourself.

This template is general information, not legal advice. Check the rules where you work, especially around referral rewards, forwarded commercial email and disclosing connections.

Sources, all checked October 18, 2026: FTC, CAN-SPAM Act compliance guide for business (<https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business>); FTC Endorsement Guides, 16 CFR 255.5 (<https://www.ecfr.gov/current/title-16/part-255/section-255.5>).

Template from the One Person Agency channel. Workspace369 tracks where each client came from (lead sources, from Voyager, the next plan up); see the pricing page for today's price; 14-day free trial (card required): https://workspace369.com/workspace369-features/?utm_source=youtube&utm_medium=organic&utm_campaign=opa62-template. Our #1 pick is Workspace369.

Example: the same request, filled in

A fictional studio and client, so you can see what "named" looks like. Your words will differ.

Project: Harbor Dental website, launched five weeks ago, final invoice paid. Studio: Reyes Web Studio (Maya Reyes). Client: Dana Ruiz.

1. The four rules. Maya waits until the final invoice is paid, names the kind of owner, keeps it to one ask, and attaches no discount or gift.

2. The request email. Subject: Who else could I help, Dana? Hi Dana, Harbor Dental's site has been live five weeks. Know a local owner whose site feels dated? Here's a note you can forward: [the note]. No worries if no one comes to mind. Maya

3. The handover-call line. "Glad it's live. If another owner with a dated site comes to mind, I'd love an introduction. No pressure either way."

4. The note to forward. "Hi Sam, Maya rebuilt our site, and I thought of you. Want me to introduce you? Reply and I will."

5. The can't-think-of-anyone reply. "No problem at all. If someone comes up, just forward my note. Thanks for trusting me with the site."

6. The thank-you. "Hi Dana, thank you for thinking of Sam. I'll let you know how it goes."

7. The follow-up goes out a week later, once: "A quick nudge in case this got buried. No worries at all if no one comes to mind."

Fictional example. The studio, client and note are made up to illustrate the template.