Bōkka

HOW-TO GUIDE

Home Builder Referral Program Playbook



A practical framework for identifying homeowner advocates, creating opportunities for referrals, and measuring the results.

BEFORE YOU START

Referrals are earned long before anyone asks for one.

Most builder referral programs are a reward at closing and nothing else. This playbook treats referrals as a measurable sales channel: find the homeowners who genuinely recommend you, stay in the relationship after move-in, and connect their advocacy to actual contracts.

8%

of leads come from referrals

35%

of sales come from referrals

Source: Builder Lead Converter analysis of 15,000+ home builder leads, May 2026.

INSIDE

01	Establish Ownership and a Baseline	3
02	Identify Potential Advocates	3
03	Design Relationship Touchpoints	4
04	Make Referrals Easy to Recognize	4
05	Use Homeowner Stories Where They Help Buyers	5
06	Protect Advocacy Through Warranty	5
—	Monthly Scorecard	6
—	Your First 30 Days	7

01 Establish Ownership and a Baseline

- [ ] **Assign an owner.**
  Choose one person responsible for the program, coordination across sales and CX, and monthly reporting.

- [ ] **Capture a baseline.**
  Record referral leads, appointments, contracts, closings, and any current referral rewards over the prior 6 to 12 months.

- [ ] **Define success.**
  Set goals for qualified referral leads and incremental sales, not just social engagement or event attendance.

02 Identify Potential Advocates

- [ ] **Review survey comments.**
  Look beyond numerical satisfaction scores for specific praise, unsolicited recommendations, and stories of how the team handled problems.

- [ ] **Ask the people closest to buyers.**
  Sales consultants, construction managers, and warranty staff can identify homeowners who are genuinely engaged.

- [ ] **Confirm willingness.**
  Ask before featuring a homeowner, using their story, or inviting them into an advocacy initiative.

03 Design Relationship Touchpoints

- [ ] **Map the homeowner journey.**
  Consider construction milestones, move-in, early occupancy, warranty, and anniversaries. Avoid relying only on closing day.

- [ ] **Make recognition personal.**
  Small community experiences or thoughtful follow-up can matter more than a generic reward.

- [ ] **Be transparent.**
  Explain any referral incentive terms and obtain appropriate permission for testimonials or paid promotions.

04 Make Referrals Easy to Recognize

- [ ] **Add CRM fields.**
  Track who referred the buyer, the relationship, source confidence, and whether a reward applies.

- [ ] **Ask consistently.**
  Include a natural referral-source question in sales discovery, even when a lead arrived through search or the website.

- [ ] **Close the loop.**
  Make sure sales, marketing, and CX teams can reconcile referrals with actual contracts and closings.

05 Use Homeowner Stories Where They Help Buyers

- [ ] **Match story to concern.**
  Use homeowner accounts to address uncertainty about communication, build quality, timelines, and after-closing support.

- [ ] **Keep the homeowner voice.**
  Favor specific firsthand details over polished generic endorsements.

- [ ] **Get approval.**
  Secure consent and follow applicable disclosure rules before using stories or incentives in marketing.

06 Protect Advocacy Through Warranty

- [ ] **Monitor the gap.**
  Compare move-in and end-of-warranty feedback, noting sample sizes and whether cohorts are comparable.

- [ ] **Assign unresolved issues.**
  Create clear ownership, escalation, and response expectations for negative feedback.

- [ ] **Report back.**
  Share recurring issues with field teams and trades, and document whether problems were resolved.

MEASURE IT

Monthly Scorecard

Compare each month against the baseline you captured in Step 1.

METRIC	BASELINE	MONTH 1	MONTH 2	MONTH 3
01 Number of identified, opted-in advocates				
02 Referral leads and percentage of total leads				
03 Referral appointments, contracts, and closings				
04 Referral lead-to-sale conversion versus other sources				
05 Program spending and cost per incremental sale				
06 Move-in and end-of-warranty satisfaction trends				
07 Open customer issues and resolution time				

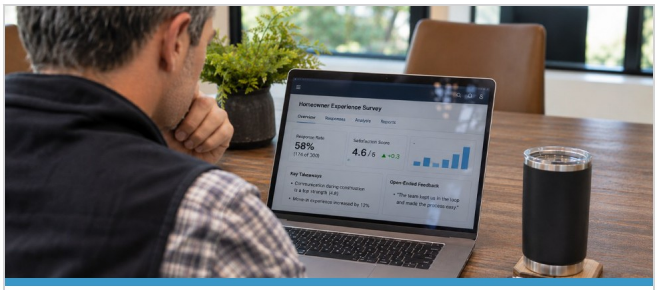
GET STARTED

Your First 30 Days



Week 1

Name an owner and agree on measurement definitions.



Week 2

Audit referral attribution and existing homeowner feedback.



Week 3

Invite a small initial group of advocates and establish consent.



Week 4

Launch one outreach touchpoint and review the first scorecard.

Put this playbook to work.

We help home builders turn great experiences into referrals and sales.

Schedule a free consultation