



Strategies to Improve Referral Connection Rates

For many communities, a key motivator for adopting a closed-loop referral system is a desire to understand what happens **after** a referral is made. While the goal is for all referrals to result in service delivery, not every family responds to outreach or engages with the service once offered.

Using IRIS, organizations gain visibility into referral outcomes, including when families decline services or do not respond to outreach. This data helps uncover patterns, identify gaps, and reveals the real-world barriers families face when trying to access support. With these insights, organizations and networks can set goals and apply quality improvement approaches to increase connection rates.

While it is disappointing when families do not respond to outreach, response rates can be improved with intentional strategies. Read on for practical examples of what has worked in IRIS Networks.

Ensure Your Organization Profile is Accurate

Clear, accurate program information is the foundation of quality referrals. Maintaining an up-to-date organizational profile in IRIS ensures that referring partners can confidently and accurately describe available services to families. When families understand what is being offered—and feel that it matches their needs—they are much more likely to respond when outreach happens.

Establish a Warm Handoff

Referring organizations play a critical role in the outcome of a referral. A “warm handoff” means preparing families for what comes next; when families know what to expect, outreach feels less like a cold call and more like a continuation of a conversation.

A few small steps can make a big difference:

- Let families know what to expect from outreach—who will contact them, when, and how.
- Provide a printed copy of the IRIS Client View referral summary, so the family has a record of the referral.

The quality of information included in the referral shapes the receiving organization's ability to make a strong first impression. Completing referral fields thoroughly helps ensure outreach is accurate, respectful, and effective. For example:

- Share family preferences, like preferred method and best time of day to contact.
- Provide important details such as primary language and preferred pronouns.
- Include relevant context to support engagement, while limiting shared family information to what is essential.

Make Outreach Timely and Persistent

Once outreach begins, persistence and flexibility matter. Consider:

- Prioritizing quick outreach. Seek to connect with the family while the referral is fresh in their minds and they are motivated for next steps.
- Using multiple modes of communication, based on organizational capacity and procedures; texting is often more effective than phone or email.
- Making multiple outreach attempts, at different times of day and on different days of the week. In some IRIS networks, a minimum number of outreach attempts is defined in Community Standards, helping ensure consistency across partners.

Keep the Conversation Open

One of IRIS's strengths is its ability to keep organizations connected throughout the outreach phase. Using the Comments feature, referring, and receiving organizations can collaborate to increase the likelihood of successful engagement.

- Share outreach attempts and updates.
- Ask for alternate contact information.
- Seek insight from the referring partner if outreach stalls. They may already have a trusted relationship with the family and have ideas to help reinforce the connection.

Use Data to Connect with Your Partners

For receiving organizations, data patterns can point to opportunities for improvement. For example, noticing that referrals from certain partners are easier—or harder—to reach can open the door to meaningful conversations. Strengthening alignment and relationships across partners is key to improving connection rates. Consider:

- Connect with partners whose referrals you successfully reach. What are they doing differently? Are there simple, replicable strategies that could be adopted across the network?
- Scheduling time with partners whose referrals are harder to reach to better understand their processes, clarify expectations, and identify opportunities to improve how your services are presented.

Rather than a single tactic, improving response rates involves strengthening the entire referral experience, from first conversation to final connection. With the right mix of clear communication, persistence, and partnership, networks can make meaningful progress in ensuring more families get connected to the support they need.