Referral Relationship Planning Worksheet

Internal advisor working tool | Complete before and after referral-source conversations

Use one copy for each priority referral-source relationship. This is an internal planning document, not a client-facing resource or a substitute for required compliance review.

A. Relationship profile

Referral-source name / firm	_____
Profession / specialization	_____
Contact information / introduction context	_____
Relevant business owner profile	_____
Current relationship status / last interaction	_____

B. Prepare for a meaningful conversation

Discussion area	Notes / prompts
Their client base	Which owners or types of businesses do they advise?
Recurring owner questions	Which challenges or transition topics arise?
How your expertise fits	When might collaboration or an introduction be appropriate?
Ways to provide value	What approved education, insights, or introductions might help?

Key questions or context to explore:

_____

_____

_____

C. Relationship development priorities

Action to consider	Priority / timing
Arrange an introductory or follow-up conversation	_____
Share a firm-approved educational resource	_____
Clarify ideal business owner situations	_____
Offer a useful professional introduction, where appropriate	_____
Establish a mutually useful follow-up plan	_____

D. After the conversation

What was learned / stated needs	_____
Specific commitments made	_____
Agreed next action and due date	_____
Next appropriate contact date	_____
Important confidentiality / compliance notes	_____

E. InfusionOS follow-through checklist

☐ Record factual relationship notes in the Referral Source contact profile.

☐ Create a task for each agreed follow-up commitment and assign a due date.

☐ Verify appropriate email authorization before sending individual communication.

☐ For automated nurture, verify authorization and manually set Nurture Permission to Yes; contact creation does not imply consent.

☐ Share only firm-approved client-facing assets from My Digital Assets.

☐ Respect confidentiality and avoid sharing client details without appropriate authorization.

Relationship review

What would make this relationship more useful for both professionals and the business owners they serve?

_____

_____

_____