Referral Relationship Development Guide

A relationship-first approach to building productive professional referral networks

Purpose

A productive referral network is not a list of professionals who may send introductions. It is a set of trusted relationships built around shared client needs, complementary expertise, professional credibility, and consistent follow-through. This guide supports relationship development before and after introductions; it is not a solicitation script.

1. Identify the right professional relationships

Prioritize professionals who regularly advise the types of business owners your practice is equipped to serve. Relevant relationships may include CPAs, attorneys, wealth advisors, consultants, and other specialized professionals.

- Consider the professional's client profile, area of expertise, geography, reputation, and opportunities for appropriate collaboration.
- Look for genuine overlap in client needs rather than expecting every professional contact to produce introductions.
- Determine whether you can provide meaningful value to their clients and to the relationship itself.

2. Understand their work before explaining yours

Approach introductory conversations with curiosity. Ask what kinds of ownership issues their clients raise, how they typically recognize the need for additional advice, and what makes a professional introduction useful.

Conversation focus	Example opening question
Their practice	Which types of business owners do you work with most frequently?
Owner concerns	What longer-term business or transition questions do clients bring to you?
Professional coordination	When would it be valuable to involve another advisory professional?
Introduction preferences	What is the most useful way to coordinate when an introduction would help?

3. Make your value and ideal fit understandable

Describe the business owner circumstances you are best positioned to address without implying that every owner needs to sell, retire, or engage immediately. Clear positioning enables another professional to recognize an appropriate introduction.

- Explain your area of advisory expertise in plain language, including when an initial conversation might be useful.
- Avoid guarantees of outcomes, value, timelines, or referral volume.
- Recognize that referrals must be appropriate for the owner and consistent with the referring professional's obligations.

4. Give referral sources practical ways to help

An approved educational resource may help a CPA, attorney, or other professional introduce useful thinking to a business owner. Advisors may share approved InfusionOS lead magnets directly with business owners or give them to referral sources to share with their clients.

- Select a resource relevant to the owner's actual circumstances, not simply the next promotional offer.
- Use only advisor-branded, non-editable resources from My Digital Assets after obtaining your firm's required compliance approval.
- If compliance requests changes, do not distribute the affected item until corrections and final approval are complete.

5. Build a consistent, respectful follow-up routine

Activity	Advisor action
After an introduction	Send an appropriately authorized follow-up, thank the professional, and record the introduction context.
When sharing a resource	Explain briefly why it may be useful and provide only the approved version or link.
Periodic relationship contact	Share relevant insights, ask about evolving client needs, and listen for opportunities to be helpful.
When an owner engages	Respond promptly, respect client confidentiality, and keep the referral source informed only as appropriate and permitted.

6. Use InfusionOS to support the relationship

- Classify the individual as a Referral Source in Contacts and maintain accurate professional context.
- Create tasks for follow-up commitments and document factual, useful notes.
- Use automated referral-source nurture only after verifying appropriate authorization and manually setting Nurture Permission to Yes.
- Do not interpret a professional introduction, business card, or imported contact record as automatic email permission.

Practical monthly relationship review

Identify which referral relationships received meaningful personal attention, which professionals would benefit from a specific approved resource, where introductions require follow-through, and which relationships merit a deeper conversation. Focus on the quality of mutual engagement, not only the number of introductions.

Guiding principle

A strong professional referral relationship makes it easier to recognize when a business owner would benefit from additional guidance. Trust, sound professional judgment, confidentiality, and consistent follow-through remain the advisor's responsibility.