ACCOUNTANCY PRACTICE LAUNCH PROGRAMME · BUILD REFERRAL PARTNERSHIPS

Referral partner tracker

A worksheet to map partner types, name your targets, define the value you give back, and set a contact cadence.

01 Choose your partner types

The best partners sit next to your work and share your clients. Pick the types that fit your niche.

- [ ] Solicitors who need an accountant for their business clients.
- [ ] IFAs and mortgage brokers whose clients need accounts and tax returns.
- [ ] Business bankers who meet new companies before you do.
- [ ] Bookkeepers who want an accountant to hand year-end work to.
- [ ] Other accountants passing on overflow or out-of-niche work.

02 Name your targets

Depth beats breadth. A few real relationships out-earn a stack of business cards.

Partner 1: name, type, and how you know them.

Partner 2: name, type, and how you know them.

Partner 3: name, type, and how you know them.

Partner 4: name, type, and how you know them.

03 The value you offer back

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Referrals flow both ways or they dry up. Be specific about what you send them.

What kind of client will you refer to each partner?

What makes you easy to refer to: your niche, your responsiveness, your fit?

04 Contact cadence

Staying front of mind is the whole game. Set a rhythm and keep it.

- [ ] Meet each priority partner properly, one to one, not at a networking scrum.
- [ ] Agree how you will pass work to each other.
- [ ] Check in on a set rhythm: a quarterly coffee, an occasional useful update.
- [ ] Thank them every time they send someone, and tell them how it went.

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