HR CONSULTANCY LAUNCH PROGRAMME · BUILD REFERRAL PARTNERSHIPS

Referral partner kit

A target-list template for accountants, solicitors and IFAs, an intro message, and a reciprocal one-pager.

01 Build your target list

The professionals who already advise your target SMEs are your warmest first source. Pick a few of each type whose clients match your niche.

Accountants: firm, contact, and the kind of clients you share.

Employment solicitors: firm, contact, and the HR work they would rather refer than do.

IFAs and financial advisers: firm, contact, and their SME client base.

02 Your intro message

One clear, personal message beats a cold pitch. Say who you help, and name what you will send them back.

Your opener: who you are, who you help, and why you are reaching out.

The value you offer back: the kind of client or work you will refer to them.

Your ask: a short call or coffee to see whether your clients overlap.

03 The reciprocal one-pager

Make it effortless for a partner to refer you. One page they keep on file that spells out the trade.

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- [ ] Who you help, in one line, and the HR work you take on.
- [ ] The clear split: you handle their clients' HR, and refer legal matters back to them (the line you set in Module 4).
- [ ] How to refer you: a name, a number, and a link.
- [ ] What they get back: the HR needs among your clients, sent their way.

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