



Partner Referral Playbook: turn word of mouth into a system

Your ideal clients already trust other advisors. Build a small network of them, on purpose, so referrals come in steadily instead of by accident.

1. Which partners to pursue, and what their clients need

Partner	Why they're a fit	What their clients need from you
CPAs	See headcount and payroll grow before anyone else	Handbooks, classification, compliance as the team passes 20–50 people
Benefits brokers	Field HR questions outside their scope every renewal	Policies, onboarding, leave administration, someone to own HR
Employment attorneys	Get the call after a workplace conflict escalates	Investigations, documentation, training, prevention going forward
PEOs	Handle payroll and benefits, not hands-on HR strategy	Advisory help, performance management, people projects
Business coaches	Hear about people problems holding the owner back	Org structure, hiring process, manager development

2. How to open the conversation

- Lead with their clients, not your services.
- *"When your clients hit 25 employees or a people problem, who do you send them to today?"*
- Offer a short call to compare client types and see where you overlap.
- Bring one useful thing: a checklist, a quick guide, an intro.

3. A simple referral agreement

- Define the ideal referral for each side in one sentence.
- Agree on the handoff: warm email intro, within 2 business days.
- Close the loop: tell the partner what happened every time.
- Put it in writing (a one-page email is enough). Check any fee arrangements with your attorney and the partner's professional rules.

4. Reciprocity

- Send referrals back. Your clients need CPAs, brokers and attorneys too.
- Co-create value: a joint webinar, guest article or client checklist.
- Publicly thank partners (with their permission).

5. Cadence to stay top of mind

- **Monthly:** share one useful update or resource.
- **Quarterly:** a 20-minute check-in on who you each serve now.
- **Always:** same-week thanks and an outcome update for every referral.

6. Track it

- Log every partner, intro, meeting and closed project in your CRM.
- Tag the source on each new client so you see who sends what.
- Review quarterly: invest in partners who refer, refresh the ones who don't.

Want a partner network and outbound working together?

Deep Lake Software builds client acquisition and partner referral systems for professional services firms.

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