



Referral Partner Checklist: Accountants

How many referral relationships do you need to grow your business?

Quality over quantity is what I say. You want to make sure that you engage in regular communication, processes and scripts. Focus on trust and grow your business relationships slowly and consistently.

Remember the core difference in the services you both offer: Accountants work in the clients "past finances" such as the last tax year, whereas Finance Brokers work in the clients "future finances" such as buying a new investment that will grow or move to a new home to live in.

Accountants

- Focus on tax-oriented problems which are usually the core services for their clients
- Not always sure how to recommend a Finance Broker
- Might not always be aware of how a Broker can support their clients

To help an Accountant you can:

- Inform them about your services and how you can help their clients
- Make them aware of the long-term benefits for their business, if they recommend additional services
- Suggest they put up a flyer of your services in their meeting room

Tips:

- Referral partnerships work both ways and rely on communication
- Make sure you do your homework before you make any informal or formal arrangements
- Ensure you have compatible personalities by meeting informally first and get to know each other
- Be yourself, be authentic and build a genuine relationship based on genuine skills
- Be upfront from the start & ensure that both partners understand the scope of services & recommendations
- Suggest a trial arrangement, where you can see if you're a good fit for each other
- When you make recommendations & strategies to referred clients, ensure you involve the Accountant
- Listen to feedback
- Be genuine when you work with referred clients, learning to be generous with your advice and suggestions
- Allow referrals to happen freely as you build your credibility and consistency
- Be reliable
- Determine which activities generate income and which activities waste money and time and plan accordingly
- Have your credentials available with a fact sheet and information about what you do
- Keep in mind that there are busy times during the year for Accountants, such as BAS and EOFY
- Make sure any formal arrangements are in writing and uploaded to your Aggregator CRM under Referrals.

"The key to any referral arrangement is having the same cultural fit & the same philosophies in communicating with the clients. We've been let down before mainly because expectations were set & then no delivery"

Accountant, Melbourne

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