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Referrals



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It's not only CPA firm marketing professionals and consultants who encourage CPAs to ask their referral sources for leads. Referral sources themselves expect to be asked for leads. While moderating a panel of referral sources for a client training program the panelists described good referral sources as those who:

- Reciprocate leads
- Provide value for fees paid
- Are responsive to both the client and the referral source
- Are team players and take an active interest in the client and the community
- Evaluate the chemistry between the client and the potential referral source

Their additional advice?

- Develop a specialty and be the “go to” person for that specialty.

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You may have specific companies you'd like to gain as clients. Create a short list and share it with your referral sources. They may be able to make an introduction – or know someone who can.

The ask. This is best done in-person and can be approached as part of your regular conversation. Focus on your referral source. Great questions include:

- How is business?
- How can I help you?
- What types of clients or projects are you working on?

More than likely your referral source will ask you similar questions. This is your opportunity to describe the type of clients you're looking for and to share your list of prospects. Here are a few ways to ask for the lead:

- If you know of other business owners – particularly those in {insert your industry specialty} – who could benefit from our services I would appreciate receiving the lead.
- I value our relationship and appreciate the referrals you've sent my way. I look forward to working with you again soon.
- Thanks for the trust you've placed in me and my firm. As future opportunities arise I'd appreciate you receiving the lead.

If you are completing a client project with a referral source be sure to let them know of your interest in collaborating again.

Follow up with your referral source whether you win the business or not. I'm a fan of the hand-written note, which will help you stand out. Also, consider sending a thank you gift.

By consistently focusing on asking referral sources for leads you it will become

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CPA Firms: How to Create the Roadmap for Your Firm's Growth and the founder of the **Capstone Community**. For more information contact her at 727.210.7306 or jcaragher@capstonemarketing.com.

Firm Management

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