



HOA.COM



Referral Partner Blueprint

Your Ultimate Guide to Creating Income, Influence & Impact

The Referral Experts

The goal of this referral partnership is to create a mutually prosperous relationship where both/all parties grow their businesses together.



HOA.com

CONGRATULATIONS!

Congratulations on joining HOA.com as build the #1 Referral Network for Professionals who serve Homeowners. We're on a mission to empower home service professionals and business owners like you with a reliable and profitable system that generates raving referrals for years to come.

1 Promote Yourself & Your Partners

Spread the word about your business and let your network and social sphere fill your pipeline with profitable prospects.

2 Team Up

Partner with professionals in complementary industries who are serving your ideal clients each and every day.

3 Engage Key Referral Sources

Build deep, trusted and highly engaged relationships that refer new clients consistently.

These are the 3 pillars of our referral marketing system. When you activate your referral network, you'll start to attract more opportunities for your business and boost your income, influence, and impact.

The Results Are In

Most business professionals agree that referrals are the best source of new business. Decades of research have proven this time and time again.

In fact, empirical studies from major universities, publications and research firms concludes:

- 90% of people trust recommendations from people they know
- People are 400% more likely to buy from you when they are referred
- 84% of Business-To-Business (B2B) sales start with a referral

So, if referrals are so profitable, why do so many professionals struggle to develop a personal practice that generates new client opportunities on a consistent basis?

For most, the answer is that they have simply never been taught the art and science of generating Raving Referrals. They are likely talented experts at their industry and craft, yet they struggle to attract clients because they lack an effective referral engine for their business. So, they grind away, day after day, buying poorly performing leads, making awkward and uncomfortable cold calls, and throwing away good money on bad marketing campaigns.

Fortunately, it really is easy to build a strong referral business when you follow:

The 3 Keys of Profitable Partnerships

- 1 Partner with Complementary Professionals
- 2 Approach Professionals Strategically
- 3 Cross-Promote With Your Partners



KEY #1. Partner With Complementary Professionals

The best referrals often come from other professionals who already serve your ideal clients.

I learned this first hand back in 1997 and had just started in the mortgage industry. I was highly motivated to succeed and started interviewing top producers in my firm and industry eager to learn their secrets to success.

As I asked where their business came from, a common theme emerged. All of the top producers I interviewed revealed that the bulk of their business came from a handful of professionals they had built strong referral partnerships with.

Without exception, their referral partners were all professionals who also served homeowners including Realtors, insurance agents, financial planners, accountants, and attorneys along with home services providers like contractors, home inspectors, and appraisers.

Makes sense, doesn't it?

After all, every one of these professionals and business owners shared the same ideal clients. Plus, they often had clients asking them for recommendations and introductions to a trusted mortgage lender. Sometimes their clients even shared their horror stories about their current lender. Eager to solve their client's challenges, these professionals were thrilled to have a mortgage lender they could trust and recommend their clients to.

Best of all, since these professionals were highly trusted by their clients, they transferred that trust on to the lender they were referring which created higher client conversion rates, higher profitability, and a better overall service experience.

Assemble Your Power Team

As I built my mortgage business, I learned first-hand that the fastest way to grow your referrals is to create a Power Team of trusted professionals who are committed to doing business with you.

Start by identifying the top industries and professions that are most complementary to you based on the type of client you serve.

If you serve homeowners, the top professions that also serve homeowners are:

- Air Conditioning (HVAC)
- Carpet Cleaning
- Electrical Work
- Financial Planning
- Flooring
- Garage Doors
- Home Cleaning
- Home Inspection
- Home Remodeling
- Insurance
- Interior Design
- Landscaping
- Mortgage
- Moving
- Painting
- Pest Control
- Plumbing
- Pools & Spas
- Realtors
- Restoration
- Roofing
- Siding & Gutters
- Solar
- Windows & Blinds

While your ideal referral partner list may look slightly different from this based on your industry and profession, this should give you some ideas on the types of professionals you should consider building strategic alliances with.

The key is to identify the right people for your team which we will cover next.

Identify Your Ideal Partners

Once you know which industries and professions you want to target, the next step is identifying the specific people you'd like to work with.

Most likely, you've known people in some of these professions for years or even decades and simply have never asked them to do business together, or formalized any type of referral partnership.

For each of your professions you've identified, start by asking yourself...

1. Who do I already know, like, and trust in that industry?
2. Who do I already refer business to?
3. Who already refers business to me?

Asking these 3 questions will create a strategic and targeted list of people you can approach about a prospective referral partnership.

The good news is that our system will help you mine these relationships and turn them into profitable partnerships that will give you referrals for years to come.

As you think about your best referral sources looking at the list above, what are your top 10 best referral partner industries:

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

KEY #2. Approach Professionals Strategically

Once you've identified your prospective partners, the second key to profitable partnerships is to approach professionals strategically.

You want to reach out to them in a way that will excite them about doing business with you. Your goal should be to have them view you as an ally and a solution provider rather than as a salesperson trying to steal their time and attention.

After years of testing, here's what we've found to be the most effective script for creating profitable partnerships. If you follow this proven script below, you'll have people lining up to meet with you.

Just say...

“Hi (name), the reason I’m calling is that I have a lot of clients who could benefit from your services and I’m creating a power team of trusted professionals I’ll be promoting to all of my clients.

I’d love to sit down with you and discuss the possibility of adding you to my team and promoting you to all my clients and colleagues.

When’s a good time to get together and strategize?”

Imagine receiving that call from someone you've known for years who serves your ideal clients all day long. Wouldn't you be excited about the possibility of having someone help you build your business and consistently refer clients to you?

Of course you would. As long as they are someone you know, like and trust.

Well hopefully you see just how strategic, impactful, and effective this approach is to initiate referral partnerships with professionals you already have a relationship with.

But how do you create partnerships with target professions when you don't know anyone in that field?

Great question...

Filling Gaps

If there is a gap in your referral team and you don't know anyone you can easily approach, simply ask your best clients and colleagues for introductions to professionals they highly recommend.

Here's a proven script you can use that will lead to introductions to quality, successful professionals who can refer new clients to you for years to come.

Let's say you were looking to partner with a CPA, but don't have any strong CPA relationships already.

Just call some of your favorite clients or referral partners and say,

“As you may know, I am in the process of expanding my business and I'm looking for a good CPA to refer my clients to. I'm wondering if you know of any high-quality CPAs you think I should meet with.

Anyone come to mind?”

This script works well because people love to help other people. By giving them an opportunity to make an introduction for you, they are not only helping you, they are also helping the other professional at the same time.

Once they identify someone they would recommend you connect with, just ask them to make an introduction in addition to giving you their contact information.

You can simply say,

“That’s awesome. Would you be willing to give them a quick call to let them know that I will be calling them (date & time of scheduled call)?”

Is there anything I should know before I call them?”

Be sure to customize the script with the profession you are being introduced to, along with the day and time you plan to call them. Using this approach, the professional you are being introduced to is already expecting your call and should be a little intrigued and may even be looking forward to talking with you. All before you even pick up your phone and dial their digits.

By reaching out to professionals you already know, like, and trust – and then filling the gaps with quality introductions from key clients and colleagues - you will quickly gain access several great professionals so you can build a powerfully profitable referral team.

If you still want more introductions, my book Raving Referrals contains a separate LinkedIn Activation strategy that will help you get professionals to introduce you to your perfect prospects and ideal referral partners like clockwork.

Make Your Meetings Matter

Now it’s time to sit down with the professionals who have agreed to meet with you to discuss the possibility of creating a strategic alliance and becoming referral partners.

Now what?

Before meeting with a prospective partner you’ve never met or haven’t spoken with in a while, take a few minutes to research them online to learn all you can about them.

Check out their website, their LinkedIn profile, and their social media accounts to learn everything you can. This will help you uncover some common interests that will help you build instant rapport with them.

Then, as you’re meeting with your prospective partner, be sure to focus the conversation on how you can help them grow their business.

Strive to give value first before asking anything from them. Show up as help and focus on helping them achieve their goals. Think about who you can introduce or connect them with that would make a difference to them personally or professionally.

The faster and more effectively you help them, the faster they will come to know, like and trust you enough to refer their valuable clients to you.

When you first connect with a potential referral partner, consider starting the conversation by saying something like,

“Thanks for meeting with me today. I’ve heard a lot of great things about you. You come highly recommended.

The reason I wanted to meet with you is that I serve a lot of (type of client – homeowners/ business owners) who could use your services. I’m hoping to learn more about you and your practice so I’m referring you the right type of clients.”

Then, as they start discussing their business with you, you can ask the 5 Power Questions for Prospective Referral Partners.

5 Power Questions For Prospective Partners

When meeting with a new prospective referral partner, consider asking the following questions:

1. How long have you been in this line of work?

This is an easy, disarming question they expect you to ask. What you are really looking to understand and evaluate is how much experience and expertise they have in their field. You also want to assess if this is someone you would feel comfortable and confident referring and entrusting your clients to. Most people will give you a thorough description of the services they provide and challenges they solve for their clients. Once they have given an overview of their experience and expertise, you can ask the second power question, which is:

2. What do you like best about what you do?

This question is designed to uncover their WHY. What is their passion and purpose that led them to choose this profession? You are looking for their motivation beyond just the money. Ideally, they will share a client success story you can later retell to some of your clients when referring them to this person. Mostly though, you are trying to discern and decide if this person shares the same values and service commitment that you do and if they are someone you would trust to serve your clients. Once they have shared their WHY, simply ask power question #3:

3. How would you describe your ideal client?

This question will help you understand if you truly share the same perfect prospect profile. If it sounds like they are describing your ideal clients, you know this is a great fit.

for a prospective partner. If not, you can still be good referral sources for each other from time to time. Either way, you should follow up by asking the 4th power question which is:

4. What would you say is your biggest business challenge?

The reason you want to ask this question is that for most professionals, the answer to this question is usually that they need more prospects, more clients, or more business. If they tell you that a lack of quality prospects is their greatest business challenge, you've uncovered a great opportunity to steer the conversation towards creating a strategic alliance and building your businesses together. First though, try to gain more information about their current business development efforts by asking the final power question:

5. Where do most of your clients come from?

Usually, the answer to this question will be referrals, at which point you can say something like:

"I'm glad to hear referrals are so important to you. I work almost exclusively by referral which is exactly why I am here today.

As I mentioned earlier, I'm looking for quality people I can partner with to grow our businesses together.

Based on what you shared about your business, you seem to be the type of person I'm looking to add to my trusted team of professionals that I promote and refer my clients to.

Just to give you a little more background on me...."

It Works If You Work It

Just imagine what your business will look like 12 months from now if you take the time to meet just one new prospective partner each week for the next year.

Let's say you did just that. You met with just one new professional each week for the next year, with the intention of creating a profitable partnership with them. Of those 50 people you meet with, if only 20% are a right fit and become your referral partners, you will have 10 new professionals.

referring profitable clients consistently for years to come. Then, for the rest of your career, you will be on easy street because you'll never have to wonder and worry where your next client is coming from.

In reality, most professionals experience much better results than partnering just 20% of the time. Especially when you understand the power of the third key to profitable partnerships, which is to cross-promote with your partners.

KEY #3. Cross Promote With Your Partners

Once someone agrees to do business with you, the next step is to create a plan that outlines how you will start promoting and referring each other.

The good news is that you can use our Referral Partner Blueprint to create a powerful and profitable referral partnership plan. Simply review the Referral Partner Blueprint together with your new partner and create an agreement on which of the 21 cross-promotion strategies and campaigns will work best for each of you.

This tool helps makes the process dummy-proof.

By collaborating and cross promoting each other, both you and your partner:

- **Increase awareness for each other's businesses and services**
- **Attract more prospects, fans, and followers**
- **Generate more leads, referrals, and other business opportunities**
- **Reduce marketing costs while increasing closing rates**

This strategy gives you the ultimate leverage for your marketing efforts because as you promote them and they promote you, your referral partners will actually transfer the deep trust they've built with their clients and prospects to you.

Imagine creating cross promotions and co-marketing campaigns with just ten other professionals. You would increase your marketing reach by 1,000% or more.

The way this works is simple. Let's say your ideal clients are homeowners and that you have 1,000 people on your mailing list. If you partner with ten other professionals who also serve homeowners with similar size mailing lists and spheres of influence, you are now being promoted, endorsed, and recommended to at least 10,000 prospective clients in addition to your own 1,000 contacts.

By helping your partners gain more visibility and grow their book of business, you dramatically increase the likelihood they will return the favor by promoting and referring you to their clients and colleagues.

21 Cross Promotion Campaigns

Professionals will eagerly agree to cross-promote you when you follow our scripts and use our Referral Partner Blueprint. This powerful tool lists 21 different ways you and your referral partners can coordinate to cross-promote each other, including:

1. Introductions

2. Client Referrals

3. Ratings and Reviews

4. Special Offers

5. Gift Certificates

6. Consultations

7. Referral Cards

8. Websites

9. Social Posts

10. Newsletters

11. Team Brochures

12. Bundled Offers

13. Direct Mail

14. Client Events

15. Sponsorships

16. Workshops

17. Podcasts

18. Video Interviews

19. Webinars

20. Referral Mixers

21. Charity Champions

The basic strategy for each of these campaigns is for you and your partners to promote and recommend each other to your respective databases and social spheres. As you do, you each expand your visibility and credibility.

Agree On Your Plan

As you and your referral partners sit down to create your Referral Partner Blueprint together, be sure to discuss and agree on:

1. What each person will promote
2. When each partner will promote
3. How often each partner will promote

We've included our Referral Partnership Blueprint in this training. Be sure to print this handy checklist to use in your referral partner meetings. This will guide your conversation with prospective partners and help you strategize and create agreement on how you will cross-refer and promote each other.

Once your Referral Partnership Blueprint is in place, and you have agreed how each person or company will promote and refer the other, simply do what you committed to do, by the time you committed to do it, while your partner does the same.

Then, as the leads and new client opportunities start rolling in, be sure to thank them each and every time they generate another prospect for you. You should also provide regular updates on the status of each client they refer you. This ensures they know exactly how you are helping each of their clients. These updates demonstrate a high level of professionalism and continually build trust which leads to further collaboration and opportunities.

Best of all, your mutual clients will often report back to your referral partners about how you've helped them. This gives your partner confidence in your ability to deliver results for their clients. They will also have personal success stories they can share with other clients facing similar challenges. Which leads to even more raving referrals coming to you and your firm.

Once you and your partners start actively referring and cross-promoting each other, you will find that your referrals and bottom-line profits will increase steadily. You'll also develop deep meaningful relationships with people you are proud to call your friends.

We're Here For You

We hope this training has been enlightening, entertaining and most of all empowering for you. We want you to know that everyone here at HOA.com is absolutely committed to your success. If you ever have any questions, feel free to reach out to our member success team by phone, chat, or email.

We would love to help you put these strategies into action and help you generate breakthroughs in your business.

If you are serious about boosting your sales, generating more referrals and taking your business to the next level, we would love to help. Our Referral Marketing System can dramatically increase your referrals and revenue as you build a business powered by referrals.

We Want To Make You Famous

As you start to win new business using these strategies, scripts, and our referral marketing system, please let us know so we can share your success with others. We'd love to broadcast your story and promote you to our referral network.

Share The Love

If this training has been valuable for you and your business, please share it with others. We'd love your help spreading the word and empowering as many business owners and professionals as possible. We truly appreciate your referrals and introductions, so feel free to share this information with your clients, professional colleagues, co-workers, staff, assistants, manager, boss, and especially with your current and future referral partners. As they apply this to their own business, they'll thank you deeply for introducing them to the World of Raving Referrals.

Are You A Top Trusted Pro?

At HOA.com, we are building the #1 referral network for professionals who serve homeowners and we're looking to partner with and promote top trusted home services professionals in your local market.

If you have been serving homeowners in your industry for 5+ years, receive a majority of 5-star reviews, and want to be promoted as the top trusted professional homeowners can trust, we want to talk to you. Should you apply and be approved, you'll be promoted as our exclusive HOA.com Premier Pro in your industry and area. Just one person or company will be chosen as an HOA.com Premier Pro in each market, so apply now at [HOA.com/pro](https://www.hoa.com/pro).

Should you be selected for this powerful and profitable program, you will be featured on the cover of Homeowner magazine with an article about you and your business. We will also build out a complete PR and social media campaign to boost your credibility and visibility to help you win more clients and make more money.

So, if you're ready to expand your business and you have the capacity to serve more clients, scan the QR code below and apply to become a Certified, Expert or Premier Pro.

Scan to Grow Your Business.





“HOA.com has been doing a great job referring us clients. In fact, we won over \$200,000 in new business from HOA.com in the first 90 days we’ve been with them.”

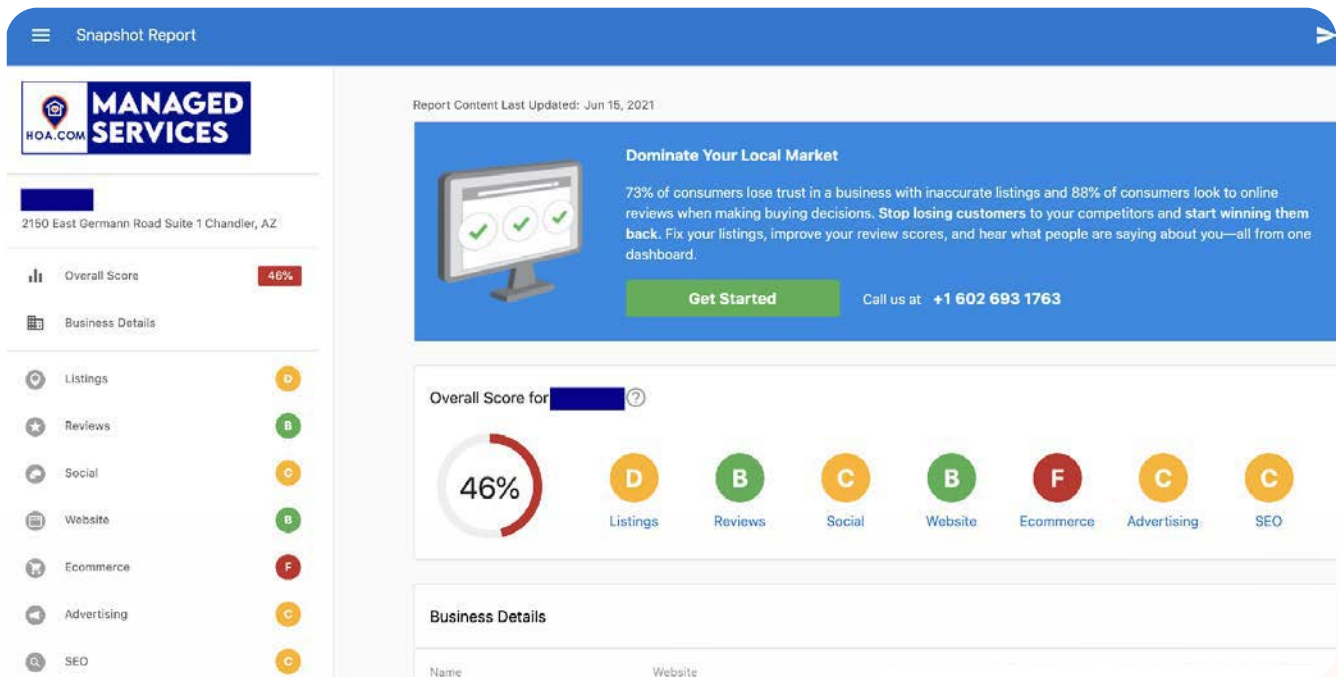
Scott Knudson - Outdoor Homes

Do You Lead A Team? Let’s Talk

If you lead or manage a team and would like to discuss coordinating a team training or pilot project with us, we’d love to support you. To schedule a call to explore the possibilities, visit HOA.com/pro.

How Do You Appear Online?

If you are curious how your business shows up to the internet world, let our Managed Services team perform an audit and analysis of your digital footprint. Our team will analyze and give you a full report of how your website, ratings and reviews, SEO, social presence, directory listings, ecommerce and advertising are performing - grading each category from A to F.



Whether you are looking for a marketing makeover or simply need a second opinion on your strategies and systems, we can help.

Visit <https://HOA.com/business-services> to view the various marketing services we provide to our members.



Referral Partner Blueprint

The 21 Top Co-Marketing Campaigns

The goal of this referral partnership is to create a mutually prosperous relationship where both/all parties grow their businesses together. To achieve this goal, the parties hereby agree to take the following actions:

- Introduce each other to prospective referral partners**
- Recommend each other to clients & colleagues**
- Invite each other to participate in joint client consultations if appropriate**
- Cross-Promote each other through:**
 - Introductions
 - Websites
 - Sponsorships
 - Client Referrals
 - Social Posts
 - Workshops
 - Ratings and Reviews
 - Newsletters
 - Podcasts
 - Special Offers
 - Team Brochures
 - Video Interviews
 - Gift Certificates
 - Bundled Offers
 - Webinars
 - Consultations
 - Direct Mail
 - Referral Mixers
 - Referral Cards
 - Client Events
 - Charity Champions