



REFERRAL PARTNER NETWORK

How to develop stronger cross-referral relationships – A guide for accounting, financial, legal and advisory firms

A self-paced eLearning course for partners, managers and support staff in professional firms | 8 Modules | 20 CPD Hours

What are Referral Partner Networks?

If you're a specialist or advisor and your principal source of new business is referrals, either from delighted clients or from referral partners, you're no doubt looking for ways to:

- generate more referrals and grow your business,
- create a supportive, collaborative network of like-minded professionals and
- add more value to your clients

Many advisors and specialists in public practice struggle to develop strong partner networks. Issues including one-way referrals, poor quality of leads and lack of engagement all contribute to a general feeling that this type of relationship is difficult to manage. What's generally lacking is a clear process that encourages the development of professional relationships.

What's this course all about?

The 8 step process outlined in this course provides clear guidelines on how to develop and maintain a referral partner network through effective branding and positioning, networking and marketing, relationship management and ongoing review and feedback.

The course provides guidelines for professionals looking to break down internal barriers and silos as well as build relationships with external service providers.

The course can be completed in group or individual format. Assessment tasks will encourage and challenge your team to consider what they can do to improve the way they work with referral partners. Support material includes workbooks, procedures and scripts relevant to the topics being discussed.

WHO'S THIS COURSE FOR?

This course is suitable for partners and managers interested in developing stronger cross-referral relationships with professional colleagues within and/or outside their firm.

Partners and Managers

This course provides partners and managers with a step by step approach to developing stronger cross-referral relationships with other service providers.

They are encouraged to involve their team in this course, to consider what changes the firm can make at an operational level to create a strong strategic partner network.

Support Staff

Support staff are encouraged to participate in this course so that they are better placed to provide operational support to the development of stronger cross-referral relationships. Focus will be on the implementation of a step-by-step process to improve business relationships.

HOW DOES IT WORK?

The Referral Partner Network eLearning course consists of 8 modules with clear learning objectives. Content includes presentations, workbooks, support materials and assessment tasks. Most importantly, learners develop their own professional development pathway using our SMART action planning template.

OUR LEARNING PROCESS

Our self-paced elearning courses follow a 4-step process in relation to learning objectives:



Assessment tasks are designed to help learners implement objectives relevant to their specific situation and capabilities. Learners are also encouraged to suggest changes in the way your firm operates when it affects their ability to manage workflow and clients at an administrative level.

For Registration details:

<https://cpdforaccountants.com.au/courses/referral-partner-network>

COURSE CONTENT

This course consists of 8 modules:

1	POSITION	What referral partnerships do you want? Value proposition Business profiling Service platform Client description
2	SEARCH	How do you find the right partners? Referral partner profile Networking Marketing Due diligence
3	ENGAGE	What engagement options do you have? Agreement options Scope and fee split Mutual expectations Review process
4	BUILD	How do you build strong relationships? Regular meetings Case studies Responsiveness Trust and handover
5	IDENTIFY	How can you identify referral prospects? Internal discovery Internal marketing External marketing Staff training
6	REPORT	What measurement systems are required? Sales pipeline Referrals register Feedback Review process
7	MANAGE	How can you deal with relationship issues? One way referrals Poor lead quality Silo mentality Lack of interest
8	PLAN	Develop your Strategic Partner Network action plan Responsibilities Existing relationships New relationships Quarterly action plan

CPD – This course is worth 20 CPD hours

PLUS 4 SPECIALIST ONLINE SESSIONS

The course content will be supplemented by 4 specialist online sessions featuring Steve Lake, Director of ReferConnect.

These sessions will incorporate practical discussions around firm positioning, engagement of referrers, implementation of referral programs and management of referral relationships. ReferConnect's mission is to provide quality clients to Financial Services Industry professionals while forging new and value driven connections with like-minded referrers. Visit www.referconnect.com.au for further information.

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THE ELEARNING ACADEMY

- Learners can complete courses at a place that suits them, within and outside work hours.
- Each learner will have a dedicated login to give them personal access to their course.
- Module material includes online presentations, workbooks, PowerPoint Slides, templates, scripts and articles.
- All modules also incorporate formal qualitative assessment tasks that encourage learners to develop practical actions demonstrating understanding of the concepts.
- All assessment tasks are scored, with directed feedback to learners on their response.
- As the learner progresses, they develop their personal SMART action list to drive change.
- Managers are able to see at a glance how their staff are progressing.
- All learners have access to course content for 12 months following their enrolment

FEEDBACK FROM PREVIOUS COURSE LEARNERS

I have found this course to be terrific to undertake. It has helped me greatly and there is a lot of work to be done next year. Thank you for all your assistance. I would rate this course 10/10

- Donna Spark

This course really made me think outside the square and challenged my thinking in a variety of ways. I have learned so much and have thoroughly enjoyed every part of it

- Louise Mason

This course has given us a lot of discussion points. It allowed us all to see what we are doing differently and become a more cohesive team. It had many different ideas we hadn't thought about and allowed us to think outside of the box. We also were able to spend the time together and it enhanced our team relationship. Thank you

- Amanda Edwards

This course has been a great investment. In time I hope to implement everything I learned, but, to be honest, implementing just some learned points is a big stride forward for my business. This course will help my clients, which in turn, will help my business. Helping my clients improve their businesses is good business for me. This course has been the best professional development I have done to help my clients in this way

- Tony Meehan

For more course feedback, visit

<https://cpdforaccountants.com.au/course-feedback>

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