



Practice Advancement Program

Marketing Referral Strategies

Course Description

Unlock the full growth potential of your practice with our hands-on referrals workshop. Designed specifically for accountants, tax specialists and bookkeepers, you'll learn how to generate referrals from customers, employees, and strategic partners with proven strategies that work in today's competitive environment. Stop begging for referrals and learn the steps you need to take to build trust and position yourself as a referable business advisor. Attendees will receive actionable worksheets to develop their own referral plans, ensuring they capture practical ideas and leave with a concrete strategy ready for implementation. Position yourself as the go-to advisor and make referrals a cornerstone of your business growth.

Syllabus

Session Objectives – Building and nurturing a referral network

- Discuss the fundamentals of building trust in professional relationships
- Learn to develop and implement an effective referral strategy
- Identify methods to leverage referrals from customers and employees

**PREREQUISITES: None