

Outreach Prompts to Engage New Referral Sources

*Below are helpful prompts to reach out to potential new referral sources. They are customized based on the type of professional you are contacting. **We offer three complimentary consultations each month to help maximize the value of your referral network. Contact us at joe@kovacscommunications.com to learn more.***

1. “Shared Client” Prompt

These prompts can be sent to professional service providers who serve your firm’s clients.

LinkedIn message

Hi [Name], I noticed we both work with [client name], which suggests you have experience working with [type of clients, e.g., small business owners in the construction space]. I often collaborate with professionals to help clients improve their finances. Would you be open to a brief call to see if our services might complement each other for future referral-sharing opportunities?

Email Message

Subject: Exploring Synergies for [Client Type] Clients

Hi [Name],

I noticed we both work with [client]; I serve them to strengthen their financial management and deliver tax strategies. I am reaching out since your experience with this client suggests you work with [describe your niche briefly — e.g., small business owners and nonprofits]. I often find that clients benefit when their accountant and [referral source’s profession] work closely together.

Would you be open to a quick 15-minute call to see if there’s mutual value in connecting?

Best,

[Your Name]

2. “Mutual Connection” Prompt

These prompts can be sent via LinkedIn and email to professional service providers with whom you or a member of your team shares a mutual connection. And while reaching out for this reason is perfectly fine, you might also consider the benefits of asking the mutual connection to put in an email introduction between you and the service provider.

LinkedIn Message

Hi [Name], I saw we’re both connected with [mutual connection] and that you work with [client niche]. I’m always looking to connect with trusted professionals to refer my clients to — would you be open to a short conversation?

Email Message

Subject: Intro via [Mutual Connection’s Name]

Hi [Name],
[Mutual connection] mentioned that you’re doing great work with [client niche]. I’d love to learn more about your approach — I am always open to building relationships with reliable professionals to refer clients to and am happy to share how I help my clients in turn.

Could we set up a short call next week?

Thanks,
[Your Name]

3. “Industry Collaboration” Prompt

These prompts can be sent via LinkedIn and email to professional service providers who work with clients like yours in a particular industry. This outreach strategy is like #1 (Shared Client prompt) except for the fact that you don’t have shared clients. It is a “colder” outreach strategy but provides opportunities to connect with more service providers than you would by focusing only on those that work with your clients.

LinkedIn Message

Hi [Name], I deliver accounting and advisory services to the [industry]. As you also support this space, I'd love to connect to compare client acquisition and service strategies — perhaps there's a way we can collaborate or share insights.

Email Message

Subject: Connecting Around [Industry] Clients

Hi [Name],

I specialize in accounting and advisory services for [industry, e.g., construction and real estate firms], and I noticed that you also work closely with that group. Our clients often ask for introductions to trusted [profession, e.g., legal or lending] partners, so I like to build relationships with professionals who understand the same landscape.

Would you be open to a short introduction call?

Best,

[Your Name]

4. “Value Add First” Prompt

These prompts can be sent once you publish some form of thought leadership (e.g. article, webinar) that might be accessed by a potential client. Although sharing knowledge with a potential client through a professional service provider is the immediate driver of the outreach, your primary intent is to begin building a referral relationship with the provider.

LinkedIn Message

Hi [Name], I recently published a short piece on [topic relevant to referral source, e.g., “cash flow planning for growing firms”]. I thought it might interest your clients. Would you like me to share it with you?

Email Message

Subject: Thought You Might Find This Useful for Clients

Hi [Name],

I recently put together a short resource on [topic] that I thought might interest you or your clients. I specialize in helping [client type] with [key service]. I'd be happy to send the piece and learn more about the kind of work you do — perhaps there's room to exchange referrals.

Best,

[Your Name]

5. “Community Connector” Prompt

These prompts are very similar to #3 but are driven less by an immediate referral relationship-building proposal and more by an interest in generating exposure. These prompts might be helpful when you know you will want to build relationships for referral-sharing purposes but don't have your entire referral program built yet.

LinkedIn Message

Hi [Name], I'm building stronger connections among local professionals who work with business owners. I'd love to include you — maybe we can grab coffee or chat about our work?

Email Message

Subject: Building a Local Network of Trusted Advisors

Hi [Name],

I'm reaching out to a few local professionals who advise business owners in [area]. I'm a [CPA / accountant / advisor] focused on [specific niche], and I believe collaboration among trusted advisors benefits everyone — especially our clients. Would you be open to a 15-minute chat or coffee in the next couple of weeks?

Thanks,

[Your Name]