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“Who's the Best Adviser? Creating Referral Relationships, But Not Competition,” The Mid-Market Report

The Mid-Market Report
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“Who's the Best Adviser? Creating Referral Relationships, But Not Competition,” The Mid-Market Report

In an article published on January 9 in The Mid-Market Report discussing how to create synergistic referral relationships, Atlanta-based Shareholder J. Scot Kirkpatrick discusses how Chamberlain Hrdlicka has – practically since its inception – leveraged relationships with CPAs forged through its ongoing tax forum series for business development. Kirkpatrick notes that, historically, “When a problem arose or an opportunity [for an attendee] would come up, the phone would ring.” He sees the key to effective referral relationships breaking down into two key steps: 1) “become the expert;” and 2) “become known as the expert.” Kirkpatrick adds, “Really the only way to do this is to do good work for people and their clients that they want to send you their clients. If you do enough of that, it's kind of funny, it just happens. I tell people, as soon as you have one mutual client, you'll have three.”

Subscribers to The Mid-Market Report may access the full article here.