



GUIDE TO REFERRAL PARTNERS

AND 5 STRATEGIES TO IDENTIFY THEM

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A Healthy Network of B2B Partners = Invaluable Referrals

The goal of building and nurturing a B2B alliance network is to gain referrals from well-respected partners in associated industries. Your success will come from consistent follow-up and excellent service to everyone who is referred to you.

How do you identify potential partners and properly vet them for inclusion? Follow these tips, then use our Referral Review Chart to see suggested partners and to organize your information.

How to identify and vet potential B2B partners:

1. Meet and greet

Meeting your potential partner in person is vital. Visit their establishment to get a sense of who they are and how they operate. Ask questions like why they choose to serve this community, how long they've been in business, and what their customers tell them.

2. Read online reviews

Yelp and Google reviews can be a good source of information about your potential B2B partner. Reviews aren't 100% reliable, yet they offer insight into what customers of the business think. You should probably avoid partnering with a company that has bad online reviews.

3. Review their website and social media presence

Many small businesses have an underdeveloped web or social presence, but that doesn't necessarily eliminate them as a possibility. You're looking for anything unprofessional or elements with which you don't want to be associated. The social media world is a small one!

4. Consider their years of service

The longer a company has been in service, the better for a potential partnership. New companies can be awesome, but without a track record, it's hard to make a decision. Many small businesses fold within the first couple of years, so a long-term partnership is preferred.

5. Check references

In some cases, you want to know more. Ask the potential partner for the contact information of a couple of satisfied customers. Contact the customers and respectfully ask if they would mind sharing their experience with you. Would they use this business again, and would they recommend it to others? If necessary, clarify any concerns with your potential partner.

Using these tips will help you properly identify and vet your potential partners. Remember, it's difficult and potentially painful to revoke a partnership, so err on the side of caution and properly vet to protect your investment.

Rialto Referral Review Chart

Service of Industry	Name	Phone/Address	Quality of Relationship
Transaction			
Lender			
Title Rep/Company			
Escrow			
Home Inspector			
Home Appraiser			
Attorney/Closing Agent			
Pest/Insect Control			
Financial Advisor			
Insurance- Auto/Health/Home			
Home Repairs/Improvement			
Handyman/Carpenter			
Plumber/Electrician/AC/ Heating			
Painter			
Drywall			
Tile			
Roofer			
Window Installation/Cleaning			
Flooring Installation/Cleaning			
Landscape/Exterior			
Landscape Design/Maintenance			
Sprinkling System Installation			
Garage Door Repair/Installation			

Rialto Referral Review Chart Cont...

Service of Industry	Name	Phone/Address	Quality of Relationship
Moving			
Moving Company			
Security Systems			
Locksmith			
Housewarming/After the Move			
Housekeeper			
Florist			
Caterer			
Photographer			
Appliance Repair/Rental			
Furniture Sales/Rental			
Furniture Cleaning/Repair			
Drapery Cleaning			
Window Covering/Cleaning			

Notes