BUSINESS BUILDER BLUEPRINT RESOURCE

Marketing Partner Outreach and Cross-Marketing Strategy

Build reciprocal local relationships that create visibility, trust, and a steady exchange of qualified introductions.

Developed from the March 31, 2026 Premium Elite Weekly Coaching Session

National Association of FHA Consultants

The Marketing Partner Mindset

A referral partner may send business without expecting a structured exchange. A Marketing Partner is different: both businesses intentionally look for ways to introduce, educate, and promote one another to a shared audience. The relationship is built on relevant value, consistent follow-up, and trust, not a one-time transaction.

> **Catherine's Core Principle**
>
> Offer to give before you get. Ask what your partner's ideal client looks like, learn how to recognize that person, and make useful introductions. Then clearly explain the clients and situations you are best equipped to help.

Referral Partner vs. Marketing Partner

RELATIONSHIP	PRIMARY BEHAVIOR	BEST NEXT STEP
Referral Partner	Sends an occasional introduction, often informally or in one direction.	Thank them, provide an update when permitted, and explore whether a deeper exchange makes sense.
Marketing Partner	Actively cross-promotes, exchanges qualified introductions, and creates shared visibility.	Agree on the audience, offer, handoff method, follow-up cadence, and simple measures of activity.

The Five-Part Partnership Promise

1. Shared audience: We serve people with related needs in the same market.
2. Relevant value: Each partner can help the other's clients before, during, or after a home transaction or renovation.
3. Easy handoff: We know what to say, who to contact, and what information is appropriate to share.
4. Mutual visibility: We create simple opportunities to educate, introduce, and feature one another.
5. Consistent care: We follow up, protect the client experience, and keep the relationship active.

Find the Right Partners

Start with one geographic area you can realistically saturate. Identify three to five businesses whose clients regularly talk about buying, selling, repairing, financing, moving, or improving a home.

Strong Partner Categories

- Transaction professionals: lenders, real estate agents, title or closing professionals, and insurance contacts.
- Property professionals: contractors, termite or sewer inspectors, specialty trades, architects, movers, and storage providers.
- Community connectors: barbers, salons, restaurants, chambers, neighborhood organizations, and other trusted local businesses.
- Client-support businesses: financial professionals, estate professionals, senior-transition services, and organizations serving homeowners or investors.

Qualification Scorecard

FACTOR	GOOD FIT LOOKS LIKE	VERIFY
Audience overlap	Serves buyers, sellers, homeowners, investors, agents, or lenders in your focus area.	Who is their ideal client?
Reputation	Communicates professionally and protects the customer experience.	Reviews, references, response time
Complementary value	Solves a related problem without duplicating or undermining your role.	When would each partner refer?
Willingness	Open to staff education, introductions, online promotion, or a small pilot.	What can they commit to now?
Handoff readiness	Has a named contact and a reliable method for receiving and updating referrals.	Contact, process, permission

Do Not Lead With a Referral Request

Lead with a client problem you can help solve and one concrete way you can support the business. The first goal is a useful conversation, not an immediate promise of leads.

Marketing Partner Outreach Scripts

Walk-In or Local Introduction | *Based on the March 31 coaching example*

Hi, I'm [Name]. I'm building my business in [area], and I help [ideal client] with [problem or outcome]. I'd love to cross-market your services to clients I meet who need [partner service].

I'd also be happy to provide a short lunch-and-learn so your team knows what I do and can recognize when a client may need help buying, selling, repairing, financing, or renovating a home. Would you be open to a 15-minute conversation about how we could support one another?

Phone Script | *45 to 60 seconds*

Hi [Name], this is [Your Name] with [Company]. We both serve [shared audience] in [area], and I believe there may be a practical way for us to create value for the same clients.

I can help your team recognize [situation you solve], and I would like to understand your ideal client so I can make appropriate introductions when I encounter them. Would you have 15 minutes on [day] or [day] to explore a simple cross-marketing pilot?

Email or LinkedIn Message | *Subject: A local cross-marketing idea for [Business]*

Hi [Name],

I serve [audience] in [market], and I often meet people who need reliable help with [partner service]. I would like to learn more about your ideal client and explore whether we could make qualified introductions and provide helpful education to one another's audiences.

One simple starting point could be [staff lunch-and-learn, preferred-provider listing, co-branded checklist, social spotlight, or shared webinar]. Would you be open to a 15-minute conversation next week?

Thank you,
[Name] | [Company] | [Phone] | [Email]

Turn the Conversation Into a Partnership

Seven Discovery Questions

- Who is your ideal client, and what usually triggers them to contact you?
- Which client situations are a poor fit, urgent, or especially valuable for your team?
- What questions do clients ask before they are ready to hire you?
- What information makes a referral useful and easy for you to handle?
- How would you like an introduction to be made, and who should receive it?
- What educational topic would be most useful to your staff or audience?
- What is one small cross-marketing activity we could test over the next 30 days?

Lunch-and-Learn Invitation | *Free educational session*

I'd like to provide lunch for your team and deliver a short, practical session on [topic]. The goal is to help your staff recognize when a client may need [service] and give them a clear, comfortable way to make an introduction.

I'll keep it educational, limit it to [20 to 30] minutes, and provide a simple handout. I would also like to learn how to recognize the clients your business serves best so I can refer appropriately. Would [date] or [date] work better?

15-Minute Partnership Meeting Agenda

1. 2 minutes: Introductions and shared audience
2. 4 minutes: Each partner's ideal client and referral triggers
3. 4 minutes: One value offer from each partner
4. 3 minutes: Handoff method, permissions, and contact expectations
5. 2 minutes: Choose the 30-day pilot and schedule the follow-up

Choose a Simple Cross-Marketing Offer

OFFER	WHAT EACH PARTNER DOES	FIRST MEASURE
Preferred-provider exchange	Add a vetted listing or resource card and explain when the service is useful.	Clicks, inquiries, introductions
Staff education	Host a short lunch-and-learn with a practical handout and clear referral triggers.	Attendance, follow-up questions
Social spotlight	Publish an approved photo, short interview, or partner tip and tag the business.	Reach, comments, messages
Co-branded resource	Create a checklist or guide that helps the shared audience solve one problem.	Downloads, scans, replies
Shared webinar or event	Teach complementary topics and give each speaker one relevant call to action.	Registrations, qualified leads
Client introduction system	Use a permission-based warm introduction and a named contact on both sides.	Accepted introductions, outcomes

30-Day Partnership Launch

1. Week 1: Choose one focus area, list five prospects, and personalize the outreach message.
2. Week 2: Contact all five, hold at least two conversations, and document each ideal-client profile.
3. Week 3: Agree on one low-risk pilot, create the asset or event, and confirm the handoff process.
4. Week 4: Launch, thank the partner publicly when appropriate, review activity, and schedule the next touch.

Keep the Pilot Small

A strong first partnership can be one staff introduction, one partner spotlight, one resource listing, or one warm introduction. Deliver consistently before expanding the arrangement.

Maintain the Relationship

Quarterly Relationship Cadence

1. Month 1: Launch the agreed pilot and confirm the correct contact and handoff method.
2. Month 2: Share one useful update, introduction, resource, or opportunity aligned with their ideal client.
3. Month 3: Visit or meet briefly, express appreciation, review activity, and choose the next collaboration.
4. Quarterly: Refresh staff awareness, approved materials, links, offers, contact details, and compliance review.

Helpful Follow-Up Script

Quarterly Check-In | *Keep it warm and specific*

Hi [Name], I wanted to check in and thank you for [specific activity]. Since our last conversation, we [result or action]. I also wanted to ask whether your ideal client, services, or referral process has changed.

I have [resource, introduction, event, or idea] that may be useful to your audience. Would you like to test that next, or is there another way I can support your team this quarter?

Common Objections

“We already have referral partners.”

That makes sense. I am not asking you to replace anyone. I would like to learn where I may complement your current network or serve as a reliable backup.

“We do not want a formal agreement.”

We can begin with one simple educational or visibility activity and review it after 30 days. The goal is usefulness, not complexity.

“Can you guarantee referrals?”

I cannot guarantee volume. I can commit to learning your ideal client, making appropriate introductions when they arise, and following the process we agree on.

Your Marketing Partner Action Sheet

#	BUSINESS / CONTACT	SHARED AUDIENCE	VALUE I CAN OFFER	FIRST ACTION
1				
2				
3				
4				
5				

Build Your First Outreach

Shared audience: ____

Partner's likely client need: ____

Value I can offer first: ____

Simple 30-day pilot: ____

Two meeting options: ____

Before You Launch

- Confirm the partner's reputation, qualifications, contact, service area, and current offer.
- Get permission before sharing client information, photos, logos, testimonials, or private outcomes.
- Use accurate claims and make clear that clients may choose their own providers.
- Have compensation, referral fees, gifts, co-marketing costs, and settlement-related arrangements reviewed for RESPA, licensing, lender, employer, and local-law compliance.
- Track introductions and follow-up without storing unnecessary private information.