

THE B2B REFERRAL ENGINE CHEAT SHEET

Your Simple Step-by-Step Guide to Building Profitable Local Partnerships

Tired of relying on ads and random word of mouth to grow your business? This cheat sheet gives you everything you need to start building smart, local B2B partnerships that send warm leads your way—without spending a dime on marketing.

Whether you're just starting out or looking to scale, this resource includes:

1. A checklist of the best types of local businesses to partner with
2. Simple cold call and email scripts that actually work
3. Pro tips from home service pro Phil Risher to help you avoid common mistakes

Print it. Post it. Use it to build the referral system your business needs.

B2B Partnership Checklist

Reach out to businesses that don't compete with you but serve the same types of customers. Start with this list, checking off all the ones that best align with your industry and business goals.

Pro Tip: Look for businesses that **offer your service as a side offering** (but don't want to do it) or ones that are often asked about it.

Top Referral Partners to Reach Out to:

- | | |
|---|---|
| <input type="checkbox"/> Landscapers | <input type="checkbox"/> Garage door repair |
| <input type="checkbox"/> Lawn care companies | <input type="checkbox"/> Interior designers |
| <input type="checkbox"/> Pest control companies | <input type="checkbox"/> Real estate agents |
| <input type="checkbox"/> Pool cleaners | <input type="checkbox"/> Property managers |
| <input type="checkbox"/> Roofers | <input type="checkbox"/> Window washers |
| <input type="checkbox"/> HVAC companies | <input type="checkbox"/> Moving companies |
| <input type="checkbox"/> Electricians | <input type="checkbox"/> Cleaning services |
| <input type="checkbox"/> Handymen | <input type="checkbox"/> Fence or deck installers |
| <input type="checkbox"/> Plumbers | <input type="checkbox"/> Tree/arborist services |
| <input type="checkbox"/> Painters | |

**MASTERS
OF HOME
SERVICE**

Talk the Talk: Cold Call and Email Scripts That Actually Work

Don't overthink your outreach. You're not trying to sell on the spot—you're just opening the door to a conversation. Use these simple, proven scripts from [Phil's referral playbook](#) to start building real B2B partnerships that bring in leads. Keep it short, friendly, and focused on how you can help them.

Cold Call Script (Phone)

Use this when you're calling a potential partner for the first time.

"Hey, do you all offer [your service]?"

(Let them answer.)

"Cool! Do you do it in-house or do you refer it out?"

(If they say no or refer out...)

"Got it. I run a [your service] business in the area. Just wanted to see if you're open to chatting about how we might work together. Who would be the best person to talk to about that?"

Pro Tip: Whether reaching out by phone or email, don't sell in the first message. Just see if they're open to a conversation. Your job is to create curiosity, not close the deal right away.



Cold Email Sequence

EMAIL #1 - DAY 1

Subject line: Partnership?

Hi [First Name],

I came across your site while looking for a local [industry] company to work with.

Are you open to a quick call about how we might partner up and refer each other clients?

EMAIL #2 - DAY 3

Subject line: Looking for a reputable [service] partner

Hi [First Name],

I came across your site while looking for a local [industry] company to work with.

Are you open to a quick call?

Would love to talk about how we can work together.

EMAIL #3 - DAY 7

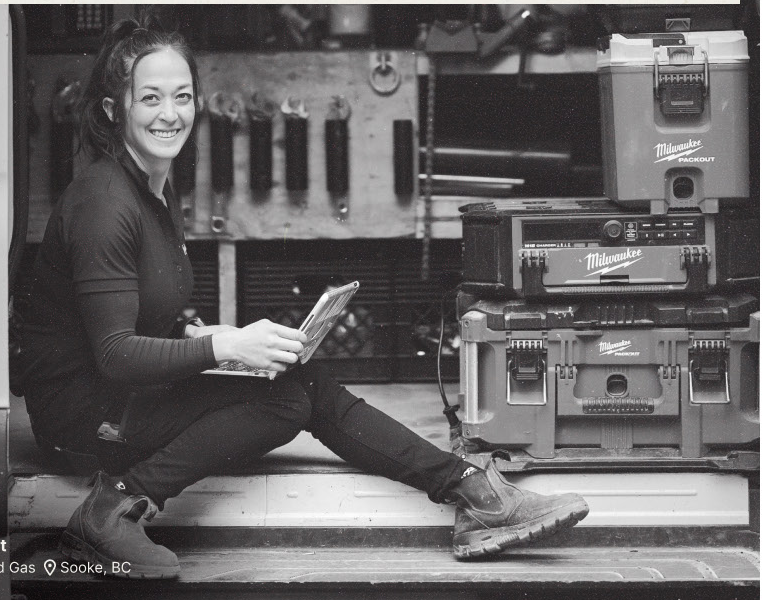
Subject line: Are you the right person?

Hi [First Name],

I came across your site while looking for a local [industry] company to work with.

Are you the right person to talk to about partnerships?

If not, could you point me in the right direction?



Mary-Anne Bowcott
Westcom Plumbing and Gas 📍 Sooke, BC

Now that you've got the tools, it's time to take action

Start small, stay consistent, and remember: every great referral engine starts with one conversation. Let's build yours.

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