## STRATEGY 9: FORM PROFITABLE STRATEGIC PARTNERSHIPS

## Sample Script for Scheduling the Initial Meeting

When you phone a potential strategic partner to propose an initial meeting, these are the key points you want to make:

* You are interested in exploring a mutually beneficial strategic partnership.
* You have research to share that will be helpful to the professional.
* You have the resources and tools to help the professional become more successful. (You need to strongly emphasize this point.)
* These resources and tools are being used, with great success, by other professionals like them.

This is a sample script for setting up a meeting with an estate planning attorney:

**“I’d like to explore the possibility of a strategic partnership. I have some great research on estate planning attorneys—your peers—and I’d love to get your feedback. As I’ve reviewed this research, I’m seeing a lot of opportunity where I could help you be more successful. I don’t know if this is right for you, but I’d like to stop by and show it to you and get your feedback, as well as explore whether there would be some synergies in our working together. If it makes sense, I have tools I can share that you can begin using right away that will likely result in more business for your practice. Let’s set up a time to get together.”**

This is a sample script for scheduling a meeting with an accountant:

**“I’m having conversations with accountants at several firms to explore the possibility of a strategic partnership, but I can only work with one or two. I helped underwrite some research on the best practices of the leading accountants—those earning more than $1 million a year—and see a lot of opportunities for where I couple potentially help you grow your practice. I’d like to meet to share some of that research with you, to learn more about you and your firm and to explore the possibilities of working together. I can also show you some of the tools I can share with you to help you bring in new business for your practice. What would be a convenient time for you to meet?”**

These are samples only. Do not simply read one of them when contacting a potential strategic partner. Use your own voice and be confident. You are, after all, offering something that most professionals will find invaluable: assistance in growing their practices.