

03

Referral Source Relationship Meeting Agenda

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USE FOR:
PRIVATE AND THIRD
SECTOR

HOW TO USE

Use this agenda to understand the other professional's work and explain yours accurately. Discuss categories of need, never identifiable client matters. Confirm any hospitality under firm policy. For Local Authorities, use template 11.

Meeting with	[Name], [Title], [Firm]
Date and time	[Date] [Time] 45 to 60 minutes
Location	[Coffee shop / their office / lunch venue]
How we connected	[Event / mutual contact / LinkedIn / previous email]
Their client type	[e.g. SME employers, landlords, growing businesses]
My objective	Understand their client base, find where our work overlaps and leave a clear picture of who to send our way.

THE CONVERSATION STRUCTURE

Stage	Say / do	Why it works
Open 5 min	Reference something specific about their recent work or sector. Open with curiosity about them, not your own story.	Gives them room to explain their priorities.
Their work 15 min	What does a typical week look like? Which contacts take most of your time? What problems do you help them with most often?	The more you understand, the more precisely you can describe who to send. They listen once they feel heard.
Where work goes 10 min	When a contact has a [your area] issue, what do you usually do? Do you already pass them to a firm? What matters most in a referral partner?	Shows whether there is a gap and what you must be to fill it.
Your work 10 min	Only now: the type of contact we work with most and the situations we handle. Two or three sentences, in their language.	One clear picture beats a full list of practice areas.
The overlap 5 min	What general situations might make an introduction useful? Please describe them without identifying anyone.	Discusses fit without requesting confidential information.
Close 5 min	Agree a useful next step if you both want one.	Record the action, owner and date. Respect a decision not to continue.

FOLLOW-UP EMAIL: WITHIN 24 HOURS

Subject: Good to meet today

Dear [First Name], good to meet today, and thank you for explaining your work with [client type]. As agreed, I will [action] by [date]. Please contact me if you would like to discuss an introduction. Best wishes, [Name]

INSIGHT

Replace presentations with conversations. Spend most of the meeting on their world; describe yours in two or three sentences.