

# Building a Referral Network with Other Professionals - But Who?

OTs, Realtors, Contractors, and Beyond, a practical webinar for aging-in-place professionals who want to grow through trusted relationships, not cold outreach.



# Why Referral Networks Matter

## The Reality Families Face

Most families do not look for aging-in-place help until a crisis arrives. When they do reach out, they rarely know which professional to call first – so they ask someone they already trust.

That trusted voice might be a realtor, an OT, a contractor, or an elder law attorney. **Your goal is to be the name that comes to mind when they need you.**

## Reframe Your Goal

Referral networking is not about generating leads or filling a pipeline. It is about becoming an integrated part of a trusted support system for older adults and their families.

When professionals across disciplines work together, families get better guidance, better options, and better outcomes. That is the real win.

- Key Point: Become the person those professionals think of when a family needs help aging in place.

# Stop Asking for Referrals — Start Building Trust

Many professionals feel awkward asking for referrals. The good news: you do not have to. There is a more natural, effective approach.

## The Old Mindset

"I need more referrals." This framing puts the focus on what you need, and can feel transactional or uncomfortable for both parties.

## The Better Question

"How can we help the same families in different ways?" This reframe positions you as a collaborative partner, not someone looking for a favor.

## What Partners Need From You

Strong referral partners need to trust three things: your knowledge, your ethics, and your follow-through. You are not asking for business, you are helping them serve their clients better.

Instead of "I need more referrals," think: "**I need more trusted professional relationships.**"

# Who Belongs in Your Referral Network?

The best referral partners are already serving older adults and their families, they just may not be working in a coordinated way yet. Here is who to look for.



## Healthcare Professionals

- Occupational therapists and physical therapists
- Hospice and palliative care professionals
- Mental health professionals
- Dementia care consultants
- Care managers
- Geriatricians
- Social workers



## Home & Housing Experts

- Realtors and senior real estate specialists
- Contractors and remodelers
- Handymen and home modification specialists
- Senior move managers
- Declutter and organization companies
- Smart home installers
- Landscapers




## Legal & Financial

- Elder law attorneys
- Financial planners
- Guardianship / conservatorship attorney
- Veterans benefits specialist
- Medicaid planning specialists
- Medicare advisor / SHIP counselor
- Assisted living placement specialists



## Community & Support

- Home care agencies
- Local senior centers
- Adult day care centers
- Meals on wheels programs
- Transportation services
- Caregiver support groups
- Faith community leaders

 Look for partners who value education, safety, dignity, and trust, and who treat families as people, not transactions.

# What Makes a Good Referral Partner?

## The Six Qualities to Look For



### Access to Your Audience

They regularly interact with older adults or adult children managing a parent's care.



### Strong Reputation

Their name carries trust in the community. Their clients speak highly of them.



### Complementary Services

Their work fills gaps yours does not, and vice versa. Together you serve the whole picture.



### Aligned Values

They prioritize dignity, education, and family well-being, not aggressive sales tactics.

## Real-World Example

"Mom can't handle the stairs anymore."

A realtor may hear this from an adult daughter, and not know whether the family should sell, remodel, or bring in more support. You become invaluable when you help that realtor understand the options clearly, so they can guide their client with confidence.

That is the power of a well-matched referral partner: **you both become better at serving families together than you would be alone.**

# The Simple Referral Circle Framework

You do not need a complicated system. You need a consistent one. This four-part framework gives you a clear, repeatable structure for building your referral network from the ground up.



## 1. Identify

Choose 10–20 professionals who serve the same audience. Start focused, a small, curated list beats a giant, unfocused one.



## 2. Introduce

Reach out with a simple, warm, helpful message. Lead with curiosity about their work, not a pitch about yours.



## 3. Educate

Share useful information they can pass along to clients, tips, checklists, short resources that make their job easier.



## 4. Stay Visible

Follow up regularly without being a nuisance. Consistency builds the trust that turns a contact into a true referral partner.

📌 Your network grows through consistency, not one big push. Start small and build steadily.

# What to Say When You Reach Out

The words matter, especially the first ones. These scripts are designed to feel warm, professional, and low-pressure. Adapt them to your voice and your market.

## First Outreach Message

*"Hi [Name], I came across your work and noticed that you serve older adults and families in [area]. I work with families who want to make homes safer and more supportive for aging in place. I thought our work might overlap in helpful ways. I'd love to connect and learn more about what you do."*

## Follow-Up After Connecting

*"Thank you again for connecting with me. I enjoyed learning about your work. I'm attaching a short home safety checklist that may be helpful for your clients. I'd be happy to be a resource if you ever have a family asking about aging-in-place options."*

→ Keep it warm and low-pressure

The goal of the first message is connection, not conversion. Curiosity opens more doors than confidence.

→ Ask about their work first

People feel valued when you show genuine interest in what they do before talking about yourself.

→ Always offer something useful

A checklist, a resource, or a helpful tip signals that you are a giver — not just a taker.

# How to Stay Top of Mind Without Being Pushy

Most referral relationships fail not because of a bad introduction, but because of a disappearing act afterward. The fix is a simple, sustainable stay-in-touch system.

## Practical Follow-Up Ideas

01

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### Send a helpful article once a month

Something relevant to their clients, not a sales pitch for your services.

02

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### Invite them to a short educational webinar

Position yourself as a resource and a connector in the community.

03

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### Comment on their LinkedIn posts

A thoughtful comment keeps you visible without crowding their inbox.

04

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### Offer a lunch-and-learn

A 30-minute informal session can turn a cold contact into a warm advocate.

05

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### Create a one-page resource sheet

Give them something tangible they can hand to clients with your name on it.

## The Golden Rule of Follow-Up

You do not need to chase people. You need a **simple, repeatable system** that keeps you present in their professional life without pressure.

Send a "thought of you" message when you see something relevant to their work. Share one simple safety tip they can pass along to clients. Small, consistent touchpoints build the kind of trust that produces referrals over time.

**Consistency is your competitive advantage.** Most people stop after one or two attempts. You will stand out simply by showing up regularly.

# Common Mistakes to Avoid

Even well-intentioned professionals can undermine their referral efforts with a few avoidable missteps. Here is what to watch for, and how to course-correct.

1

## Asking Too Soon

Requesting referrals before trust is established feels presumptuous. Build the relationship first, referrals follow naturally.

2

## Being Unclear About What You Do

If partners cannot explain your services in one sentence, they cannot refer you confidently. Sharpen your language.

3

## Only Reaching Out When You Need Business

That pattern feels transactional, and people notice. Stay in touch consistently, not just when business is slow.

4

## Forgetting to Thank the Referral Source

Always acknowledge when someone sends a client your way. A simple thank-you reinforces the behavior and deepens the relationship.

5

## Ignoring Unexpected Partners

Some of your most valuable referrals may come from professionals outside your immediate niche, faith leaders, pharmacists, or community volunteers.

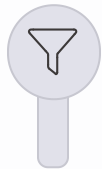
# Your "Do This Next" Action Plan

Momentum comes from small, specific actions, not big, overwhelming plans. Here is your assignment for this week.



## Make Your List

Write down 15 possible referral partners in your local area. Include professionals from healthcare, housing, legal, and community sectors.



## Choose Your First Five

Narrow your list to five people you feel most comfortable approaching. Warm contacts and mutual connections are a great place to start.



## Send One Introduction

Use the outreach script from today's session. Keep it short, warm, and focused on them, not on what you need.



## Choose a Resource to Share

Select or create one helpful resource, a home safety checklist, a tip sheet, or a short guide, that adds value for their clients.



## Set Your Follow-Up Reminder

Mark your calendar for 2–3 weeks from now to follow up. The goal is one honest conversation, and then another, and another.

✔ The goal is not perfection. The goal is one conversation. Small actions build real momentum.

# Make It Interactive: Reflection & Practice

Learning sticks when we apply it in the moment. Use these prompts to engage attendees and help them personalize what they have heard.

## Reflection Question

"Who already serves the same families you want to reach?" Take 60 seconds to write down three names or professions that come to mind right now.

## Live Poll

Which referral partner feels most valuable for your business right now?  
OTs/PTs · Realtors · Contractors · Home Care · Elder Law · Care Managers · Other

## Quick Exercise

Write down five professionals in your local area you could contact this week. Include at least one you have never reached out to before.

## Script Rewrite

Transform: *"I'm looking for referrals."*  
Into: *"I help families with \_\_\_\_\_, and I'd love to learn how your work supports them too."*

These moments of active participation help attendees move from passive listening to real-world readiness, and that is where lasting change begins.

# Key Takeaways & Your Next Step

## What We Covered Today

- Referrals come from **trust, not pressure**, shift your mindset first.
- The best partners **already serve your audience**, find where they are.
- **Clear language** makes you easier to refer, sharpen your message.
- **Follow-up matters more** than one perfect introduction.
- Start with a **small, focused group** and grow from there.

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## Continue the Conversation

### Coming Up Next

- How to Create a One-Page Referral Partner Sheet
- LinkedIn Networking for Aging-in-Place Professionals
- How to Host a Lunch-and-Learn That Builds Referrals
- Creating Referral Scripts That Feel Natural

## Your Closing Thought

Building a referral network does not have to feel awkward or salesy. It starts with one honest conversation.

Choose a few professionals who serve the same families you care about. Learn about their work. Share what you do clearly. Offer helpful resources. Stay in touch.

The families who need aging-in-place support are often overwhelmed. When professionals work together, those families get better guidance, better options, and better outcomes.

| Choose five people. Send one message. Begin the conversation.