

MERLIN

BUILDING
REFERRAL
NETWORKS:

Sustaining
Relationships
in a Transactional
World

infinia

Sustaining Relationships in a Transactional World

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Even in a time where every aspect of life is transitioning to digital, the human factor remains central to building and sustaining personal and business relationships.

The health and wellness sector is no exception, particularly when it comes to building referral networks to drive growth, better serve patients, and recruit the best talent.

In the pages that follow we highlight eight proven tenets of effective referral networks that will help you achieve your performance goals and sustain relationships in a transactional world; as Tom Peters would say, this is a blinding flash of the obvious, but important to remember nonetheless.



1 Understand The Market

- + Build out your goals. What do you hope to gain from developing a strong referral network?
- + Develop an understanding of all your available resources and assets
- + Generate a list of wellness professionals who will better serve their clients by referring your offerings, creating a mutually beneficial relationship
- + Learn about the challenges referral partners and referred individuals face and how you can provide a solution



2

Showcase Your Services

- + Provide previews of your service offerings, especially to professionals whom you have strong relationships
- + Create joint offerings with referring institutions, again establishing a mutually beneficial relationship
- + Use social media and email outreach to create a welcoming, inclusive community and raise awareness for your business



3

Focus Outreach Efforts

- + Identify the major focus of your networking efforts (i.e. attract professionals, institutions, or patients)
- + List out wellness professionals and previous patients you can contact
- + Reach out individually or host small events to educate and attract more individuals
- + Make sure you include one-on-one conversations in your efforts
- + Share only trustworthy information
- + Always keep your network up to date

4

Construct Your Network

- + Organize contacts by category (i.e. patient, professional, institution)
- + Make sure to include a list of referred individuals
- + Keep your list updated whenever you meet a new professional or attract a new client
- + Utilize helpful technology software such as New Network Dataset Wizard
- + Update and track clients' health challenges to help further connections



5 Growth Is a Contact Sport

- + When facing clients, ask for permission to have their doctor's contact information and reach out to him/her to discuss a referral relationship moving forward
- + When interacting with other professionals, use business cards, Vcards, or get personal contact information to expand your referral network



6

Cultivate Referral Partners

- + Be prepared. This includes a strong understanding of your service standards and access agreements
- + Let the patient or professional speak first to better understand their needs
- + Time is valuable; make sure the pitch is short and concise and targets what the patient or professional is looking for



7

Attend Professional Events

- + Professional events are ideal formats for meeting individuals who have associations and connections
- + Attending charity and community events help to raise awareness
- + Don't underestimate the value of the human element and face-to-face conversations



8

Align Staff Incentives

- + Provide employees with additional benefits for successful referrals made
- + Develop and maintain strong relationships with staff. This makes it more likely they will refer others
- + Harness the multiplier effect of word-of-mouth marketing



Summary



1 Understand
The Market



2 Showcase
Your Services



3 Focus
Outreach Efforts



4 Construct
Your Network



5 Growth Is a
Contact Sport



6 Cultivate
Referral Partners



7 Attend
Professional Events



8 Align Staff
Incentives

“

All this stuff we know
we ought to do, but we
forget it when we start
looking at spreadsheets
or whatever the hell else
it is. That's exactly what
this is. A blinding flash
of the obvious.

”

— Tom Peters

Selected Clients



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We create effective tools, brand strategies, designs, and communications that move markets, organizations, and the world forward by transforming complexity into simplicity and ensuring what is simple becomes memorable.

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