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The Easier to Refer System

The Grand Unveiling of 25 Referral Systems

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Section 1: Introduction

Purpose of This Workbook

Welcome to the foundational masterclass briefing of The Easier to Refer System. This companion guide is engineered to help you translate high-level relationship concepts into an operational asset within your practice. High-value advisors do not have a lead generation problem; they have a friction and reputational risk problem. The goal of this curriculum is to replace hope-based word-of-mouth with a reliable, predictable referral architecture that honours your professional standing.

Who This Is For

This workbook is designed specifically for attorneys, CPAs, commercial bankers, fractional executives, and elite consultants who have accumulated significant local goodwill and market authority. It is for advisors who understand that their true worth is determined by how much more they give in value than they take in payment, and who are ready to build a systematic business development engine without resorting to aggressive sales tactics.

Who This Is Not For

This material is not intended for transactional sales operators, cold-outreach spammers, or those seeking automated, low-touch lead generation hacks. If your objective is to trade cash kickbacks for warm leads or force high-pressure sales pitches onto introduced prospects, this methodology will not align with your firm.

The Expected Transformation

By working through this guide, you will transition your firm from relying on passive, unpredictable word-of-mouth to owning an intentional referral infrastructure. You will identify hidden social friction points within your network, eliminate reputational hesitation for your allies, and select a single starting referral system to deploy within the next 48 hours.



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Section 2: Relational Capital & Friction Audit

Auditing Your Growth Baseline

Before installing new systems, you must establish an accurate baseline of your firm's current relationship channels. Most professional practices survive on disorganized goodwill, which leaves them vulnerable to natural market contraction. Take a moment to evaluate where your current client acquisitions originated over the past twelve months. Calculate the approximate percentage of new revenue generated through existing clients, strategic partners, and internal team members or alumni.

Existing Best Clients: _____%

Strategic Partners & Allies: _____%

Internal Team & Network Alumni: _____%

Assessing Reputational Risk and Network Hesitation

When a client or partner hesitates to refer you, it is rarely due to a lack of respect for your technical skill. In almost every instance, hesitation is driven by fear of social or reputational risk. Your network will always protect its own social capital before helping your business grow. Identify the single biggest unspoken fear your clients or professional partners might harbor regarding introducing someone to your firm.

My network's primary unspoken fear regarding an introduction is:



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Diagnostic Alignment: Myths, Mistakes, and Best Practices

To build an effortless referral pipeline, you must eliminate the psychological misconceptions and operational errors that create friction across your network. Review the core diagnostic criteria below and mark the areas that require immediate attention in your practice.

The Three Myths to Shatter

1. Doing great work is enough: Exceptional technical execution prevents client churn, but dedicated operational systems generate introductions.
2. Clients do not want to refer: Happy clients genuinely enjoy helping their peers, but high cognitive friction stops them from taking action.
3. Cash incentives drive quality referrals: Financial compensation cheapens warm professional relationships, whereas social capital and genuine appreciation build long-term advocacy.

The Three Mistakes to Eliminate

1. Asking vague, open-ended questions: Prompting your network with "Who else do you know?" forces them to perform all the cognitive matching work on your behalf.
2. Treating warm intros like cold pitches: Subjecting a referred lead to a traditional sales pitch destroys the referrer's trust instantly.
3. Operating in a communication black hole: Failing to update the referrer on the outcome of an introduction ensures they will hesitate to introduce anyone else.

The Three Best Practices to Install

1. Provide explicit safety guarantees: State clearly how you will handle introduced contacts so your referrer feels completely protected.
2. Deliver zero-effort introduction copy: Provide 30-second pre-written templates so your network never has to write an email from scratch.
3. Acknowledge action immediately: Express genuine gratitude the moment an introduction occurs, regardless of whether the lead converts into revenue.



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Section 3: The System Selection Matrix

The Quick-Win Principle

The fastest path to momentum is building where warm relationship equity already exists. Do not spend energy attempting to construct cold strategic alliances if you have a base of raving clients waiting to be engaged. Our methodology follows a strict sequential order: extract delight from existing clients first, equip your internal team second, and construct peer-to-peer strategic partner engines third.

The Three-Phase Sequential Pathway

Clients First	Employees Second	Partners Third
Harvest immediate goodwill from your existing client base.	Turn daily client interactions into referral invitations.	Construct multi-way peer alliance engines with non-competitors.

Best Client Systems

Your existing clients already trust your work. They require low-friction mechanisms and clear language to advocate for you safely.

- System 1: "Just Checking In" Calls: Non-commercial, high-empathy touchpoints that build trust by completely removing sales pressure.
- System 2: Card Engine: Systematic, personalized appreciation cards that maintain top-of-mind awareness.
- System 3: "Bring a Colleague" Event Invitations: Plus-one event mechanics that deepen event commitment while introducing new peers.
- System 4: VIP Client Advisory Board: Inviting key clients into an inner circle to test concepts and build psychological co-ownership.
- System 5: "Golden Ticket" VIP Passes: Exclusive, scarce passes that allow clients to bestow a complimentary high-value audit upon a colleague.
- System 6: "Hero" Case Study & PR Kit: Celebrating client victories to create shareable assets.
- System 7: Milestone & Life-Event Tracking: Unexpected non-promotional gifts at key moments.



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- System 8: Authoritative Books: Gifting problem-solving books to clients to share with peers.
- System 9: Transformational Thought Leadership: Educational, entertaining content built to transform.

Strategic Partner Systems

Non-competing advisors serve your ideal audience every day. Structuring non-competitive alliances creates consistent cross-promotional momentum.

- System 10: Strategic Partner Masterminds: Facilitating peer groups of non-competing advisors to collectively solve shared client problems.
- System 11: The Trusted Advisor Directory: Curating a vetted preferred-vendor list that adds value to clients while honoring partners.
- System 12: "Give-First" Reverse Matching: Sending client leads to strategic partners before ever requesting an introduction in return.
- System 13: Educational Seminar Series: Co-hosting quarterly workshops with complementary professionals to share expertise and audience reach.
- System 14: Co-Authored Benchmark Reports: Publishing industry research alongside strategic partners to establish joint authority.
- System 15: Podcast Guesting & Hosting: Interviewing partners to highlight their expertise to your audience.
- System 16: Private Co-Hosted Dinners: Facilitating elite 8-person roundtables for mutual networks.
- System 17: Diagnostic Benchmark Quiz: Co-branded 3-minute self-assessment tool for partner audiences.
- System 18: Conference & Retreat Ecosystems: Gathering industry leaders in immersive, talk-generating events.

Employee and Internal Network Systems

Your team members and former colleagues interact with your market daily. Equipping them with clear frameworks turns your staff into an acquisition engine.

- System 19: Influencer & Advocate Ecosystems: Providing exclusive access, recognition, and content assets to vocal brand supporters.



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- System 20: Gamified Internal Advocacy: Recognizing and rewarding team members for identifying organic client expansion opportunities.
- System 21: VIP Alumni Network: Maintaining structured communication with former high-performing staff who now inhabit new business networks.
- System 22: Team "Law of Receptivity" Training: Teaching staff how to comfortably accept client compliments and pivot them into referral prompts.
- System 23: Client Onboarding Surprise Gifts: Team-driven initial 90-day delight triggers.
- System 24: Internal "Talk Trigger" Sprints: Systematizing memorable operational surprises staff can deliver.
- System 25: Zero-Friction Intro Templates: Equipping every staff member with pre-scripted, single-click email templates.

Selecting Your First System

Attempting to launch multiple systems simultaneously leads to operational paralysis. Examine your current practice assets and select **ONLY ONE** system from the menu above as your immediate starting point.

My chosen starting system for the next 48 hours is:



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Section 4: The 48-Hour Execution Blueprint

Locking In Your Single System Focus

Once you have selected your starting system, you must define its operational scope. Clearly articulate who this system targets, the specific friction point it eliminates, and why it is 100% reputation-safe for the referrer.

Target Audience

☐ Existing Clients | ☐ Internal Team | ☐ Strategic Partners

Friction Being Eliminated

Reputational Safety Guarantee



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Operational Readiness and Safety Standards

A system requires clear ownership and calendar space to survive. Assigning an internal manager guarantees that introductions are tracked, acknowledged, and processed without relying entirely on the firm owner's memory.

- Target Build Date (2-Hour Block This Friday): _____
- Internal System Owner / Manager: _____
- Tracking CRM Location / SOP Document: _____

The Speed-to-Lead Service Level Agreement Protocol

When an introduction enters your firm, time is the primary variable controlling reputational safety. A slow response reflects poorly on the referrer and damages trust before the initial conversation takes place. Enforce a mandatory Service Level Agreement (SLA) requiring all warm introductions to receive a white-glove response within 60 minutes of receipt.



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Section 5: The AI Humanification Engine

Preserving Human Warmth in Digital Outreach

Artificial intelligence should never be deployed to automate away human relationships or flood networks with robotic sales sequences. The true purpose of AI in referral system design is removing writing friction, speeding up campaign preparation, and helping you draft highly personalized outreach assets.

The Master Prompt Framework

Copy and customize the fill-in-the-blank prompt template below into your preferred AI tool (ChatGPT, Gemini, or Claude) to quickly generate zero-friction outreach copy that maintains warmth and respects professional identity.

Act as an expert relationship strategist guided by Bob Burg's Go-Giver principles and Chris Voss's Tactical Empathy framework.

Help me draft a 3-sentence, non-salesy outreach message for [INSERT SYSTEM NAME, e.g., System 1: "Just Checking In" Calls].

Target Audience: [INSERT TARGET AUDIENCE, e.g., Past CPAs in my local network]

Primary Goal: [INSERT GOAL, e.g., Schedule a brief, non-commercial check-in call]

Key Constraint: The message must contain ZERO sales pressure, preserve the recipient's reputational safety, and make it completely safe for them to say "no."

Ensure the tone is warm, professional, authentic, and concise.



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Section 6: Conclusion and Next Immediate Steps

Schedule an Executive Referral Friction Audit

Ready to put a clinical mirror up to your practice? Schedule a private, 45-minute strategic diagnostic session led directly by Jeff Borschowa to evaluate your top 20% client concentration and expose the structural points where Reputation Drift is costing you high-value introductions.

We guarantee to identify at least 3 specific, actionable referral friction points in your practice, or we will issue an official, signed Clean Bill of Referral Health Certificate validating that your practice sits in the top 1% of market referability.

Select Your Booking Path:

- Option A: Direct Executive Booking (\$1,000 Direct Fee): Access standard commercial scheduling directly on your immediate timeline.
👉 <https://buy.stripe.com/14A6oGfJl7cD18s8U2fEk0X>
- Option B: Philanthropic Allocation (\$500 Direct Donation): In lieu of our standard fee, make a direct \$500 donation to [Project Ahava](#) to support safe, dignified living for Holocaust survivor Sami Steigman. Email your official donation receipt to jeff@pharosbusiness.com to receive your priority scheduling link.

Your Implementation Checklist

To turn this workshop briefing into measurable progress, complete these four execution milestones over the next 48 hours:

1. Finalize System Selection: Complete the diagnostic audit in Section 2 and confirm your single starting system in Section 3.
2. Execute Friday's Build Block: Reserve a mandatory two-hour window on your calendar this Friday to draft your scripts, SOPs, and tracking templates.
3. Register for Session 2: Join us next Wednesday at 2:00 PM ET as we execute a full 60-minute operational deep dive into System 1: "Just Checking In" Calls.



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4. Book Your Referral Readiness Review: Schedule your complimentary 30-minute Referral Readiness Review to audit your network matrix and eliminate hidden friction points alongside our team.

Access session resources, template downloads, and future briefing registrations at:

<https://pharosbusiness.com/easier-to-refer/resources>