



# Building a Predictable Referral Engine

Syllabus

Updated: May 2026

## Training Overview

**This training will help you define and implement a consistent referral engine. As a busy MSP professional, you have limited time and budget for selling. By identifying and working with your perfect clients, you can use your resources more efficiently and make a greater impact on your business.**

**The goals of this training are to:**

- **Understand why you need to define your perfect client**
- **Craft a unique selling proposition and properly articulate your value**
- **Learn how to get a referral and what to say in a referral meeting to develop a referral engine**

**Participants will learn how to develop a proven strategy to get referrals and determine who is your perfect client. Discover how to craft the right message to ensure that your MSP stands out to prospects, including what you do and how you can help them.**

**Attendees are asked to be prepared to actively participate, share and engage with the instructor and other attendees to get the most value from this training.**

## Training Inclusions

- **4-hours of virtual, interactive content taught by an expert instructor with MSP sales expertise**
- **Downloadable videos\* of the content you can watch on-demand at your convenience**
- **Downloadable slide decks, handouts and resources**

## Learning Objectives

**Partners attending this training will learn how to:**

- **Define your perfect client**
- **Create an elevator pitch, or a 30-second explanation, for why an SMB should work with you**
- **Get a 5-minute meeting with your top prospects**

\* Videos will either be recordings from your session or previously recorded material in which partner faces and voices have been removed. It is recommended to attend trainings live to receive the full benefits of interactive Q&A with the instructor and class participants.

## Training Topics

### Session 1: Defining your perfect clients

- What does sales success mean to you?
- What is the difference between sales and marketing?
- Which characteristics should be included (and not included) in the definition of your perfect client?

### Session 2: Delivering a 30-second explanation

- How to answer the question “What do you do?” and turn it into a conversation
- Discussing value, not price
- What makes you unique?

### Session 3: Finding your perfect clients

- Present your 30-second explanation
- Referral programs that work (and those that don't)
- Purchasing a list with characteristics of your perfect client and what to do with it

### Session 4: How to turn your perfect prospect into your perfect client

- Goals of a 5-minute meeting and guidelines for running one
- Follow up after a 5-minute meeting
- How the 5-minute meeting fits into your sales process

## Meet the Instructor



### James LaVine

Academy Partner Enablement Advisor

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### Testimonial

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*"I highly recommend this training for individuals who are new to the MSP space and/or are new to selling. The strategic selling tactic taught in this class has really jumpstarted our new MSP business."*

A. Gasswint, SimpleITSM

### Testimonial

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*"...helped cut through the noise of sales and narrowed down a solid approach to generating business for managed service providers."*

T. Bechel, SimpleITSM