USING YOUR NETWORK TO MONETIZE PARTNERSHIPS

February 10, 2026

LUKE Frye CPA

WHO I AM?

The 1st accountant at Bench.co, helping scale from zero to 3000 clients.

Former tax practice owner where I leveraged Hubspot, Ignition, and Xero to help automate my processes to grow to $500k in recurring revenue in under 5 years.

The 1st account executive at Pilot.com to break $40k MRR in one month (my quota was $9k)

Head of CS, Sales, and Accounting Partnerships at Puzzle.io.

Now, bringing the best practices from scaling tech companies to help streamline accounting practices.

Sales in accounting firms is considered a four letter word I get it.

Most sales orgs are not known as bastions of ethics.

“I get all my clients from referrals” Ok... but, what if you want to grow faster? What if you want to grow more specifically in a niche?

Referrals from other professionals.

1 Lawyers
2 Other accountants
3 Bookkeepers or tax people
4 Insurance brokers
5 Real estate agents
6 Bankers
7 BNI groups

Sales Basics

- Set up a CRM and use it.
- Don’t let it go stale and treat it with the same intensity you treat your client month end close or tax filing list.
- Systemize your outreach and follow up.
- Use a framework like MEDDIC or BANT.
- Follow up more than you think you should. Deliver value. 7 follow up emails is not too many.

Referrals & Partnerships

When you go to your family doctor for an issue, they may have to refer you to a specialist eg a cardiologist, oncologist, neurologist.

These referrals are highly successful and not even thought of as a “referral” in the same way we think of getting new clients for our accounting practice.

In reality, these types of referrals happen all the time in larger accounting firms. Tax people rarely if ever do audits, and vice versa. Corporate tax people rarely touch personal, and so on.

Partner with other firms who provide complementary services to expand your offerings, keep your clients, and drive revenue.

HOW? How to Partner

Direct referral.

- ✦ Trust and good karma.
- ✦ No control over volume.

Referral for a fee or revenue share.

- ✦ May undermine credibility.
- ✦ Common in software (Gusto, Ramp).

Whitelabel the other provider's services.

- ✦ Consider a markup for managing the relationship.
- ✦ Add them as a contractor in your engagement letter

Restaurants as an example for how to execute work.

Example: Pilot.com providing tax

Be Intentional

- Systemize your partnerships to stay top of mind.
- Send a friendly email at least once a month.
- Buy them books, coffee, and build a relationship.
- Structure this in your CRM.
- Find other firms who aren't taking on new business and build relationships with them.

Downstream Effects of Strategic Partnerships

- Succession planning.
- Short-term disability planning.
- Keeping it in the family.
- Naturally cross-polinate good ideas.
- Taking better care of your clients.

Summary

- You currently are in a community.
- Could you replicate the same power of the BDO alliance?
- How can you support one another to get the types of clients you’d like, while not stepping on each others’ toes?

LUKE Frye CPA

Helping accounting firms scale with clear systems and intentional growth.

Let's stay connected:

- Follow me on LinkedIn
- Learn more at lukefrye.co
- Connect directly on LinkedIn

Based in Vancouver
If you're local, let's grab a coffee and talk shop.