Trade Customer Lists With Partner Businesses

THE BIG IDEA

Find a business that serves your customer but does not compete with you. Each of you tells your own customers the other is the best.

Part 1: How the swap works

Two trusted names, each one vouching for the other.

01 **Pick a partner who serves the same customer.**
A plumber and an HVAC company work in the same homes but do not compete.

02 **Each of you emails your own list.**
Your partner writes to their customers about you. You write to yours about them.

03 **Make it a real endorsement.**
Write a personal introduction: "I want you to meet the best HVAC company in town." Say why you trust them.

04 **Keep it exclusive.**
The pull comes from being the only name your partner recommends.

05 **Do one swap a quarter.**
Each round puts you in front of a new group of trusting customers.

Part 2: Keep it clean

Why these leads are good, and how to protect trust.

01 **The lead arrives pre-sold.**
Someone they trust vouched for you. You skip the cold pitch.

02 **Never hand over contact details.**
Do not share, sell or swap customer names, emails or phone numbers.

03 **Email only people who agreed to hear from you.**
Use opt-in customers. Include your unsubscribe link, and honor it.

04 **Only recommend work you stand behind.**
Your name is on the line. Pick a partner you would use at home.

05 **Get the details in writing.**
Agree on timing, wording and who pays for what. Ask your advisor about email rules.

> "Highly validated, highly specific, without you having to sell your services."
>
> Sharran Srivatsaa

DO THIS WEEK

- ☐ List 3 local businesses that serve your customers but do not compete with you.
- ☐ Call the best fit and offer a one-time swap. Each of you emails only your own list.
- ☐ Draft your intro email: one paragraph on who they are and why you trust them.

Ask quarterly: Who could I introduce to my customers this quarter?