

STRATEGIC ALLIANCE ECOSYSTEM

The *DREAMS* Partner Program

WORK SMARTER. NOT JUST HARDER.

A strategic alliance ecosystem for professionals who already advise, serve, sell to, or influence business owners — built to create new revenue, deepen client loyalty, and uncover hidden money for every business you touch.

70–
90%

OF B2B SALES FROM WARM
RELATIONSHIPS

10+

STRATEGIC ALLIANCE
CATEGORIES

6

DREAMS SCORE DIMENSIONS

5

PROVEN PARTNER SCRIPTS

THE FOUNDATION

What Is the DREAMS Score Analyzer™?

A comprehensive business review that uncovers the hidden money, inefficiencies, and opportunities most business owners never knew existed. The DREAMS Score Analyzer™ is a structured diagnostic that examines every major cost center and opportunity in a business — giving partners a powerful, value-first conversation starter that makes them the hero to every client.

D.R.E.A.M.S. — SIX DIMENSIONS OF BUSINESS OPTIMIZATION

D

DEBT

Refinancing, interest reduction & cash flow improvement

R

RETIREMENT

Plan optimization & fiduciary efficiency

E

EXPENSES

Payroll, benefits, insurance & vendor overpayments

A

ASSETS

Tax credits, incentives, depreciation & energy savings

M

MONEY

Liquidity, tax strategy & cash acceleration

S

SECURITY

Legal, risk, insurance & compliance gaps

WHAT WE UNCOVER

Hidden Money Hiding in Plain Sight

Every business owner we meet is leaving money on the table. The DREAMS Score Analyzer™ finds it — fast.



TAX CREDITS

Hidden federal & state incentives most businesses never claim



PAYROLL SAVINGS

Tax savings & compliance opportunities in every payroll



BENEFITS AUDIT

Identify health & benefits overpayments immediately



ENERGY SAVINGS

Operational & energy inefficiencies costing real money



AI & AUTOMATION

Technology optimization to reduce cost & increase output



RISK & COMPLIANCE

Legal gaps & insurance blind spots that create liability

IDEAL PARTNERS

Who This Program Is For

If you already have relationships with business owners, you're already halfway there. The DREAMS Partner Program was built for professionals like you.



CPAs & Accounting Firms

You see the numbers — now help clients keep more of them.



Payroll Companies & PEOs

You're already inside payroll — unlock savings hiding there.



Fractional CFOs

Add a powerful diagnostic to your advisory toolkit.



Insurance & Benefits Brokers

Already talking cost & protection — expand the conversation.



Business Consultants & Coaches

Trusted advisors who influence decisions before vendors are chosen.



Real Estate & Asset Pros

You know when companies are growing, moving, or expanding.



Marketing & Technology Firms

Growth creates higher payroll, higher taxes, more to optimize.



Industry Influencers

You sell into the same verticals repeatedly — leverage that trust.

THE VALUE PROPOSITION

Why Partners Love It



No Selling Required

Simply make an introduction. We handle the analysis, presentation, and close.



You Look Like the Hero

Your clients get real, tangible value — and you get the credit for bringing it to them.



New Recurring Revenue

Earn referral fees, revenue sharing, and recurring overrides — without adding workload.



CPA & Attorney-Friendly

Designed to complement — never compete with — your existing professional relationships.



Scales Without Effort

One introduction can unlock ongoing revenue. Build a flywheel, not a treadmill.

THE VALUE PROPOSITION

“

Chess, not checkers — and you're already on the board.

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REFERRAL FEES

Earn per qualified introduction made



REVENUE SHARING

Ongoing splits on closed business



OVERRIDES

Recurring income on active accounts



WHITE-LABEL

Brand the analyzer as your own service

THE PROCESS

How It Works

Five simple steps. Zero complexity on your end. Maximum value for your clients.

01

Identify a Business Owner

Someone in your existing network who could benefit from a financial review.

02

Introduce the Analyzer™

A simple, no-pressure introduction to the DREAMS Score Analyzer™.

03

We Analyze the Business

Our team conducts a comprehensive review across all six DREAMS dimensions.

04

We Present the Findings

A clear, compelling presentation of savings and opportunities uncovered.

05

Everyone Wins

Your client saves money. You earn revenue. We grow together.

70–90%

OF ENTERPRISE B2B SALES
FROM WARM RELATIONSHIPS

3×

FASTER SALES VELOCITY VIA
TRUSTED INTRODUCTIONS

10+

PARTNER ALLIANCE
CATEGORIES IN THE FLYWHEEL

\$0

UPFRONT INVESTMENT
REQUIRED TO BECOME A
PARTNER

B2B REFERRAL FLYWHEEL BLUEPRINT

Strategic Alliance Master Map

Every category below represents professionals who already have trust with business owners.
One relationship can unlock dozens of clients.

01

Financial, Tax & Compliance Gatekeepers

They see everything — payroll, margins, tax pain, compliance gaps.

- › CPAs & Accounting Firms
- › Tax Preparers / EA Firms
- › Payroll Companies & Reps
- › Fractional CFOs / Controllers
- › ERC / ERTC Consultants
- › R&D Tax Credit Firms
- › Business Loan Brokers
- › PEOs

02

Insurance, Benefits & Risk Advisors

Already talking to owners about cost, protection, and compliance.

- › Health Insurance Agents
- › P&C Insurance Agents
- › Benefits Brokers
- › Workers' Comp Brokers
- › Cyber Liability Advisors
- › Life Insurance Agents
- › Business Continuation Specialists

03

Business Advisors, Consultants & Coaches

Trusted voices who influence decisions before vendors are chosen.

- › Business & Management Consultants
- › Exit Planning Advisors
- › Business Coaches
- › EOS / Scaling Up Implementers
- › AI Consultants
- › Energy Efficiency Consultants
- › Solar Consultants (Commercial)

04

Real Estate, Facilities & Asset-Based Pros

They know when companies are growing, moving, or expanding.

- › Commercial Real Estate Brokers
- › Mortgage Brokers
- › Equipment Leasing Brokers
- › Facility Management Companies
- › Property Managers
- › Security System Providers

05

HR, Recruiting & Workforce Channels

They live inside payroll, headcount, and compliance conversations.

- › HR Consultants
- › Recruiting & Staffing Firms
- › Temp Agencies
- › Employee Wellness Consultants
- › Training & Development Firms
- › OSHA / Safety Consultants

06

Marketing, Media & Visibility Pros

Growth = higher payroll, higher taxes, more inefficiency to fix.

- › Marketing & Digital Agencies
- › SEO Agencies
- › CRM Consultants
- › AI Marketing Automation Firms
- › Podcast Hosts & Influencers
- › PR Firms
- › Business Branding Firms

07

Industry-Specific Business Influencers

They sell into the same verticals repeatedly — high-trust niches.

- › Auto Dealers
- › Trucking & Logistics Firms
- › Construction Companies
- › Contractors (HVAC, Plumbing, Electrical)
- › Restaurants & Hospitality
- › Manufacturing Reps
- › Equipment Sales Reps

08

Associations, Networks & Aggregators

One relationship = dozens or hundreds of businesses.

- › Chambers of Commerce
- › Trade & Business Associations
- › Franchise Groups
- › BNI / Referral Groups
- › Mastermind Groups
- › Trade Shows & Business Expos

09–10

Legal, Structural & Logistics Advisors

Involved during big decisions & high-exposure operations.

- › Business & Corporate Attorneys
- › Employment Law Attorneys
- › M&A Advisors & Exit Planners
- › Delivery & Courier Companies
- › Fleet Managers
- › Logistics Consultants

CHRIS VOSS-STYLE CONVERSATION FRAMEWORK

Strategic Partner Scripts

Calibrated questions, no-pressure positioning, and curiosity-first framing — designed to open doors without ever feeling like a pitch.

01 · INITIAL PARTNER CONVERSATION

"Would you be opposed to a simple way to add more value to your business-owner clients — without adding more work or learning a new product?"

"We help business owners uncover hidden money — tax credits, payroll savings, benefit overpayments, energy inefficiencies, and AI optimization. How are your clients currently identifying those kinds of blind spots?"

02 · EXPLORING FIT

"How do you currently help your clients reduce expenses or increase profitability — beyond your core service?"

"What happens if a client is unknowingly overpaying and no one brings it to their attention?"

"Would it be unreasonable to explore a value-first review that doesn't disrupt your existing relationships?"

03 · THE SOFT INTRO ASK

"Would you be opposed to making an introduction if we could deliver insights that make you look like the hero — without you having to explain tax code or compliance?"

"If this worked exactly as described, how would that impact your client retention?"

04 · HANDLING HESITATION

"It sounds like protecting your client relationships is important."

"What would need to be true for this to feel like a win for you?"

"How does this compare to other referral partnerships you've seen?"

05 · NEXT STEP CLOSE (NON-THREATENING)

"Would it make sense to test this with one client first?"

"What's the downside of seeing a sample Dreams Score analysis before deciding?"

★ REFERRAL ASK FOR AGENTS

"Hey [Name], really appreciate our relationship. You work with business owners, and so do I. If any of them are ever looking to reduce overhead or protect their business more efficiently, I'd love an intro. I'll treat them like gold and make you look great in the process."

BUILD YOUR SYSTEM

The Referral Flywheel

A repeatable system that turns trusted relationships into a steady stream of warm introductions — and warm introductions into revenue.

AGENT ACTION PLAN

1

Reach Out to 3 New Referral Partners Weekly

CPAs, payroll providers, HR consultants, financial advisors, satisfied clients, and local associations.

2

Follow Up Monthly with Value-Add Content

Case studies, savings examples, and program updates keep you top of mind.

3

Host Quarterly Partner Zoom Calls

Lunch & learns, webinars, and joint workshops deepen relationships and generate referrals.

4

Track Every Contact in Your CRM

Consistency is the flywheel. Every follow-up compounds over time.

5

Ask for Warm Intros After Every Win

Your best referral source is a happy client. Make asking a habit, not an afterthought.

WARM-UP OUTREACH SEQUENCE

STEP 1 · DAY 1 — INITIAL CONTACT

"Hey [First Name], I work with business owners to help them unlock hidden tax credits, reduce energy and IT costs, and improve group benefits — often with zero upfront investment. Thought it might be worth a 2-minute look. Want me to send over a quick overview?"

STEP 2 · DAY 3 — VALUE TEASE FOLLOW-UP

"Quick example — we helped a [type of business] unlock over \$XX,XXX in payroll tax credits they didn't even know they qualified for, and saved 20%+ on cloud computing costs. Would it make sense to do a quick check to see if your company qualifies?"

STEP 3 · DAY 6-8 — FRIENDLY NUDGE

"Just bumping this up — not here to pitch anything you don't need, but if you're open to ways to reduce costs and boost ROI without changing your current systems, I'd love to connect. If now's not the right time, happy to follow up later."

POWER LANGUAGE

Phrases That Open Doors

Use these calibrated phrases to lower resistance and spark curiosity — without pressure.

“Help me understand...”

“How are you currently handling...?”

“What happens if nothing changes?”

“Would it be ridiculous to...?”

“How would this impact your clients if it worked?”

THE UNIVERSAL ALLIANCE ASK

One Simple Ask. Unlimited Potential.

“We help business owners uncover hidden money — tax credits, payroll savings, benefit overpayments, energy inefficiencies, and AI optimization. Would it make sense to collaborate so your clients get more value without you doing extra work?”

Use this as your foundation. Customize it by category. Repeat it consistently.

 Referral Fee

 Co-Branded Analysis

 White-Label Analyzer

 Joint Webinars

 Client Appreciation Events

The DREAMS Partner Program

A strategic alliance ecosystem for professionals who already advise, serve, sell to, or influence business owners. If you work with business owners and want to add value, create new revenue, and strengthen client loyalty — this program was built for you.



Work Smarter. Not Just Harder.

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THE PROGRAM

- › DREAMS Score Analyzer™
- › Partner Compensation
- › Alliance Categories
- › Partner Scripts
- › Referral Flywheel

PARTNER TYPES

- › CPAs & Accountants
- › Insurance & Benefits
- › Business Consultants
- › Real Estate Pros
- › Marketing & Tech Firms