

## Instructions for using the 1:1 Referral Source Worksheet

This worksheet is not intended to be filled out by someone on their own. Quite frankly, it will not be effective unless it is done with two people. One member needs to “interview” the other member and collaborate with them on the answers. The person conducting the interview, should have already been interviewed by another member that has experienced the worksheet with another member. If done properly, the person being interviewed will have a large list of referral sources to invite to their chapter meeting (potential power partners) and an extensive list to develop an entire series of weekly presentations, with a SPECIFIC ASK!

#1. Easy question to answer for most people.

#2. This can be tough. We need to help the member break their business down into its smallest possible transaction, component or LCD (lowest common denominator). Do not accept a broad general category. For example, a member who does merchant services might say, I only do one thing, credit card processing. However, if you dig deeper you may find out that they offer E-Commerce processing, typical brick and mortar location processing and POS (point of sale) systems.

#3. They can choose the most profitable part of their business or they can choose to focus on a part of their business they would like to develop and grow.

#4. Make sure their answers are not too broad. Get them to be as specific as possible about their target market.

#5. These are the same things they should be telling their chapter members in their regular 1:1 meetings. What to look and listen for –

#6. This is tough for most people because they will ask a question that is selling. The goal is to not ask Yes or No questions, but rather open ended questions to get the person to tell you their story or share their issue/problem. A good example might be to ask, “how does that make you feel when that happens?” Really work hard to get questions that are not selling. These are again the things they should be teaching their chapter members in their regular 1:1 meetings. If they do not know how to start a conversation about the people they want give referrals to, how can they ever give a referral?

#7. Have them give you an example of a problem they solved for someone using the product or service they selected in question #3.

#8. What sets them apart from others in their profession or why should someone refer business to them?

#9. This is the MONEY question. Most people will be able to list off a few referral sources, but this is where the magic happens. Most people will only think of the obvious sources for themselves. The magic is that the member conducting the interview is not bound by what the other member knows about their business. They can offer a fresh objective perspective for the member. Work hard to think of people or professions that deal with their same target market (question #4), but does not compete with them for the same business.

HOMEWORK: Once you have a list of referral sources you need to do the following. Make a spreadsheet and list each different profession at the top of each column (1 per column). Then under each profession, you list the people you know that fall under each profession. These are the people you need to be inviting to your chapter and possibly to become your power partners. Solicit other members of your chapter to invite the same people if they are potential referral partners for them as well. Then do some research for each profession. Find out who are the leaders or movers and shakers in each profession. **YOU MUST ALWAYS LIST THEIR NAME, TITLE, COMPANY NAME AND LOCATION.** Then prepare a weekly presentation for each of the names on your list (you will likely have close to a year’s worth of weekly presentations).

Now start using these weekly presentations. Do the same one for a few weeks in a row. Not everyone is at every meeting, not everyone is active listening and you have different visitors in the room every week (yes we often see visitors stand up and say, “I know the person you are asking to meet).

If you do not get the referral, put it on the bottom of your stack and move to the next one. Continue this process until you are getting the referrals you want to receive.

By doing this we are accomplishing several things. First, we are making it easier for our chapter members to refer to us. By giving the four required elements of the specific ask, we are triggering the reticular activator in everyone’s brain. This is the part of the brain that searches our memory. It is the same part of the brain that helps you remember a time and place, for example, when you hear a certain song or smell a certain food. Remember this saying:

***“We never know who someone knows, until we know who they know and they never know if they know who we want to know, until we ask them if they know them.”***

The second thing we accomplish is we are systematically training our sales force, over time, exactly who we want to meet and why.



# 1:1 Referral Source Worksheet

Bring 2 copies and have each person interview the other and write down their answers.  
Do not give someone a completed one you've done for yourself. Ask these questions.

<b>What is your name?</b>	<b>Company Name?</b>
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**1. What do you like best about what you do?**

**2. What are the three most profitable products or services you provide?**

1.	2.	3.
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**3. If you could only sell and grow one of those products or services for the next six Months, which one would you choose and why?**

**4. Who are the most profitable customers or clients you have for that?**  
**Age? Occupation? City? Income? Gender?**

1.	2.	3.
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**5. If I want to refer customers or clients to you what should I look or listen for?**

1.	2.	3.
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**6. If I see or hear those, what two questions should I ask to open a conversation?**  
*Not promoting or selling you, just to start them talking. Keep it very short and simple.*

1.

2.

**7. What's a recent testimonial or customer/client success using that product or service?**

**8. What experience or credentials do you have that most don't?**

**9. Who is someone or what profession could give you 2 new clients every week?**