

## WHERE ARE YOU NOW

## WORKSHEET F-7

### Rate Your Current Referral System

1= Never 3=Sometimes 5=Always

I have a Referral Marketing Plan and work the plan	1	2	3	4	5
I track where each of my referrals come from	1	2	3	4	5
I have a firm understanding of my Target Market	1	2	3	4	5
I know the amount of business that I generate by referral	1	2	3	4	5
I have a "thank you" system for each of my referral sources	1	2	3	4	5
I have an organized database system that is easy to use	1	2	3	4	5
I keep my database updated regularly	1	2	3	4	5
I have a mission statement for myself and my company	1	2	3	4	5
I understand how to develop a referral partner	1	2	3	4	5
I know the value of an appointment	1	2	3	4	5
I have written goals for each of my networking groups	1	2	3	4	5
I have a systematic approach for motivating my referral sources	1	2	3	4	5
I have a system for staying in contact with my referral sources	1	2	3	4	5
I know how many referrals I need to keep my pipeline full	1	2	3	4	5
I know how to do focused networking	1	2	3	4	5
I have a clear benefit statement for each of my products	1	2	3	4	5
I understand the benefits of my products or services	1	2	3	4	5
I have the ability to implement a new system in my business	1	2	3	4	5
I understand the value of coaching & accountability partners	1	2	3	4	5
I consistently get high level referrals from my Referral Sources	1	2	3	4	5
<b>TOTAL</b>					

100	Business By Referral
80-99	A little tweaking needed
60-79	This is the IF System at work
40-59	Leads appear but quite by accident
20-39	Lots of work needed, but it is a place to start

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**Your S/I/R Network Worksheet**  
 Support / Information / Referral

This worksheet will help you identify who you already know  
 and who is missing from your “network”.

**SUPPORT NETWORK:**

Who can I go to when:

- I need to let off steam or vent? \_\_\_\_\_
- I need to have some fun? \_\_\_\_\_
- I need uplifting and/or encouragement? \_\_\_\_\_
- I need to brainstorm or share ideas? \_\_\_\_\_
- I need to share uncomfortable things like money or conflict resolution?  
 \_\_\_\_\_
- I need to be inspired? \_\_\_\_\_

**INFORMATION NETWORK**

Who do I know who can give me information in the following areas?

	<u>FULL NAME</u>	<u>COMPANY</u>
<b>Legal</b>		
1.	_____	_____
2.	_____	_____
3.	_____	_____
<b>Administrative Issues</b>		
1.	_____	_____
2.	_____	_____
3.	_____	_____

*Continued on next page*

## Your S/I/R Network Worksheet

### Technology

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Bookkeeping / Accounting

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Human Resources

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Coaching / Consulting

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Mentor / Expert in my Field

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Industry Association

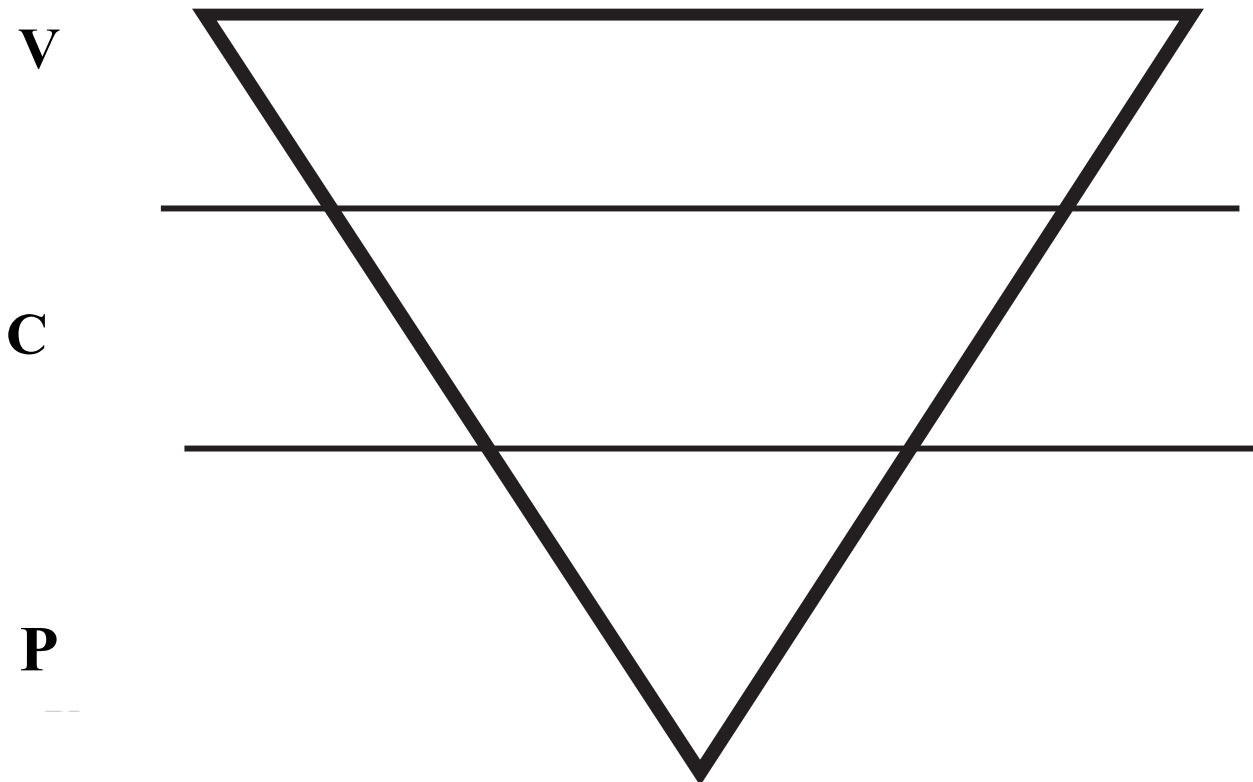
1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Your S/I/R Network Worksheet

### The VCP Process (refer to Your Team worksheet)

This will help you identify *how well* you already know who you know. And then can help you build DEEPER relationships for a BIGGER outcome!

### V-C-P Worksheet



**V = Visibility: This is where you receive Possible Leads**

You have their card. Someone asks for a carpet cleaner, you say, I've heard of this guy, here is his info.  
The objective: to get people to REMEMBER YOU.

**C = Credibility: You will potentially receive more reactive referrals.**

You know them and trust. Either have used or know someone who has and is viable source.  
The objective: for people to gain trust in you, to believe you are a valuable resource and believe in your products/services.

**P = Profitability: You will receive consistent, closed business referrals from your Referral Partners.**

The objective: RP's seek out referrals for you – ask if they need your help before being asked. Does business with you.

#### SO HOW CAN YOU WORK PEOPLE DOWN (OR OUT OF) THE FUNNEL?

Sort thru your database or stack of business cards, and apply the VCP Process to each person. Purge those who you don't know, don't like, don't get the "Givers Gain" approach to business.

## **Your S/I/R Network Worksheet**

### **WHAT MAKES A GOOD REFERRAL PARTNER?**

#### **7 Criteria of a Referral Partner**

**They must meet all 7 criteria or be willing to learn!**

1. You like each other and have the desire, or could be inspired to help each other.
2. They have the time, or are willing to make the time, to help you.
3. They are coachable. They have the ability and temperament to be trained by you to do the things you want them to do.
4. They have the resources necessary to help you.
5. They have access, and credible relationships in your target market.
6. They make good referrals for people you know.
7. They have influence in your TARGET (Niche) MARKET.

### **WHO'S IN MY CONTACT SPHERE?**

These categories have natural referral connections. Think about who gives you and who you give referrals to easily.

*Examples: Architect – MEP – Structural – Civil – Landscape Engineers – Contractor/Developer*

Who is IN your contact sphere?

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## Your S/I/R Network Worksheet

### REFERRAL NETWORK

Who, Where and How did I meet and in the following areas?

#### Source 1: Contact Sphere Relationships

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

#### Source 2: Business Network Members

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?	<u>Referral in last</u> <u>12 Months?</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## Your S/I/R Network Worksheet

### Source 3: Satisfied Clients

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Source 4: Staff Members or People You've Worked With

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Source 5: People Whose Business Benefits from YOURS

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

## Your S/I/R Network Worksheet

### Source 6: Others You Do Business With

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Source 7: People Who Have Given You Referrals

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

### Source 8: People You Have Given Referrals TO

<u>Name</u>	<u>Point of Contact</u> Where/How Did we meet?	<u>Relationship</u> Level of VCP?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____





## Networking Purposefully

### **7 Types of Networking Groups / Organizations**

Which one(s) do you belong to, or attend, and why?

**1. Casual Contact:**

A general business group that allows many people from various overlapping professions.  
i.e. Chamber of Commerce's, Rainmaker's

**2. Community-Service Clubs:**

They provide an opportunity for you to put something back into the Community where you do business. Service clubs do not offer great opportunities to get immediate business.  
i.e. Rotary, Toastmasters, Kiwanis, local arts organization.

**3. Women's Business Organizations:**

Women's business organizations have been instrumental in shaping the nature of contemporary networking organizations. These groups were created as bona fide networking organizations.

I.e. NAWBO, NOWIB, NAWIC, BWC

**4. Professional Associations**

These have existed for years. Members tend to be from ONE specific industry. Your goal with joining is to tap into a group that has your target market OR best represents your profession.

i.e. SMPS, AIA – American Institute of Architects, BAGI

**5. Social / Business Organizations:**

More and more of these pop up that serve both business and social organizations. They sometimes have activities with business or networking giving you an opportunity to combine work and a little pleasure.

i.e. Church, Meet-ups, Non-dues organizations

**6. Strong-Contact Networks:**

These are groups that meet every week for the primary purpose of exchanging referrals, building business. They often restrict membership to one profession per group.

i.e. BNI, Goldstar

**7. Online Networks:**

Virtual networks.

i.e. LinkedIN, Facebook, Pintrest, Google+, youtube, Instagram

**RULE OF THUMB:** Be a Member of 3-4 of these. And only 1-2 of the same.

## **10 Commandments of a Networking Mixer:**

Commandment 1: Have Your Networking Tools with You at All Times

Commandment 2: Set a Goal for the Number of People You'll Meet

Commandment 3: Act Like a Host, Not a Guest

Commandment 4: Listen, and Ask the Five "W" Questions:  
Who, What, Where, When, and Why

Commandment 5: Give a Referral Whenever Possible

Commandment 6: Describe Your Product or Service

Commandment 7: Exchange Business Cards with the People You Meet

Commandment 8: Spend Ten Minutes or Less with Each Person You Meet  
and Don't Linger with Friends and Associates

Commandment 9: Write Comments on the Backs of the Business Cards You Collect

Commandment 10: Follow Up with the People You Meet

**RULE OF THUMB: For every hour of networking, plan on 1 hour of follow up.**

## **Set Goals Before You Go!**

Know WHY you are attending an event, mixer, or other type of networking meeting.  
Is it to:

- meet a specific person?
- hear someone talk (education)?
- connect with your target market?
- meet NEW people/expand your network?
- for the community involvement?
- Just enjoy the free wine/beer and cheese?