



PRE One on One Getting to Know You

Date of meeting: _____

Met with: _____ Business Name _____

Product or Service _____

Best clients now (actual clients, not profiles)

1. _____
2. _____
3. _____

A good referral would be (profiles or specific companies)

1. _____
2. _____
3. _____

Core Group/Member Prospects

1. _____
2. _____
3. _____

Other

1. _____
2. _____
3. _____

One on One Template P.2

These questions will help you better identify referral opportunities for each other.
Remember, Give 1st and it will always come back to you multiplied.

Where do you find clients/customers?

How does your product/service benefit a client or customer?

Why will someone buy from you?

How do you present your product/service to a prospect?
