



PROACTIVE REFERRAL WORKSHEET

Be **PROACTIVE** during your One to Ones instead of simply **REACTIVE** between weekly meetings.
Complete the below worksheet to help identify referral opportunities for your fellow members.

Description of Client

You list descriptions of your next 5 clients, appointments or interactions

What You Should Look For

They give you phrases or triggers you should look for to recognize a referral opportunity

Language Used to Generate a Referral

They give you the language for each scenario that you use to guide the conversation toward a referral

EXAMPLE (*Meeting with a residential cleaner*)

Single mother with 2 children

I don't have enough time in the day to get everything done.

A good friend of mine is a residential cleaner that is also a single mother, I bet she would love to help out. Can I introduce you?

