

The ideal client/customer profile

The type of people and businesses you want to work with are...

[Use bullet points here to briefly describe the type, sector, minimum and maximum size, age, characteristics and attributes of the sorts of referrals you want]

The types of services/products you want to provide to them are...

[Use bullet points here to briefly describe the type of work, needs and service requirements you want them to refer to you]

You also need to know this about the type of referrals I want...

[Use bullet points to provide other information that will help them give you the right kind of referrals]

I am categorically NOT interested in these types of referrals

[Use bullet points to give them clarity over the type of referrals you do NOT want]

What is the date of our last one to one outside of the group?

[If this date is more than 6 months ago then book in another!!]

Date and time of next one to one (outside meeting):

Location:

Other useful information

- [Insert details of anything else that will help them be more effective at giving you referrals]

Contact details of the person you are having the one to one with:

Full name:

Address:

Best landline number:

Mobile: