

Referral Radar Worksheet

Purpose: Stay aware of referral opportunities by identifying key scenarios, industries, and trigger phrases related to fellow members' businesses.

Member Name: _____

Business: _____

Ideal Clients: _____

Top Referral Triggers

1. Life Events

- Scenarios:

2. Challenges or Problems

- Scenarios:

3. Industry or Business Needs

- Scenarios:

Industries or Professionals to Watch

- _____
- _____
- _____

Actionable Phrases for Referrals

- " _____ "
- " _____ "
- " _____ "

Tracking Referrals

- People I've referred recently:

- 1. _____ - _____
- 2. _____ - _____

- Follow-ups needed:

- _____