



REFERRAL EXCHANGE[®]

person to person

Referral Planner

1. Write down 5 friends or family members who you know, know lots of people:



Write down 3 ways you're going to connect with them:



2. Write down 3 potential chance encounters:



Write down 2 ways you will connect:



3. Write down 3 professional, business, or service contacts:



Write down 2 activities that you're going to do to work with them:



4. Write down 3 associations, groups that you are a member of:



Write down 2 ways that you will connect/showcase your skills:



5. Identify 3 relocation partnership opportunities in your area:



Identify 2 ways to connect/showcase your expertise:



6. Identify 2 potential advertising/marketing opportunities in your market:



Write down which one you're going to test (3x minimum):



7. Write down 3 friends/family members who live in a different city/state:



8. Write down 3 clients who are moving to/from a different city/state:



9. Write down 1 current lead source that you don't always follow up on:



10. Estimate how many leads/year you don't follow-up on more than once _____

If you get 1 new client for each item = 10 new clients



10 clients x average home sale/purchase = \$ _____ X .03% commission = _____ increased revenue