

MC3 Connection Meeting Worksheet

Who you are?

Give a brief explanation of who you are and why you are in the business you are in. This is the opportunity to let your partner “get to know” you. Use the MC3 Member Bio sheet as a reference.

Use this area to record goals, accomplishments and interests. Share this form with your partner during the Connection Meeting. Sharing this information will help them better match their contacts with your goals and vice versa.

Goals:

Accomplishments:

Interests:

The ultimate measure of a successful meeting is both the commitment and result of finding a referral for each other. Make sure you bring referral slips with you to the meeting. Ask your partner to define what a good referral is for him/her.

Get your partner to teach you helpful hints that could lead to a referral for him/her.

Ask what words you should use to make the referral connection.

Obtain the appropriate form of consent from those individuals that you refer to MC3 members as potential clients/customers. (Get their implied or express consent to share their contact information.)

A good referral would be:

Reasons this type of referral works well are:

Phrase(s) to listen for and thing(s) to look for:

Tell them:

"Use the following words to turn this opportunity into a referral". It is also important to tell the potential client/customer "what's in it for them",
