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|  **Name:**  | **Company:**  | **Date:**  |

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| **BUSINESS INFORMATION** | **PERSONAL INFORMATION** | **MISCELLANEOUS** |
| **Business Name & Contact Info:**       | **Family Members:**       | **My burning desire is to:**       |
| **Something no one knows about me:**  |
| **Profession:**       | **Pets:**       |
| **Years in this Business:**       | **Hobbies / Activities:**       | **My key to success:**       |
| **Previous Types of Jobs:**       | **City of Residence (how long?):**       |

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| **GAINS Worksheet** |
| **Goals (Short Range):** |       |
|  **(Long Range):** |       |
| **Accomplishments:** |       |
| **Interests:** |       |
| **Networks:** |       |
| **Skills:** |       |

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| **Revenue Goal:** |       | **Average Deal:** |       | **Number per month:** |       |

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| LAST 10 CUSTOMERS & CONTACT SPHERE WORKSHEET |

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| **Last 10 Customers / Acquaintances** | **Notes:** (How do you know them? What did you do for them?) |  | **Notes on Referrals for your business:** |
| **1** |       |

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 | GOOD REFERRAL SOURCES:      |
| **2** |       |
| **3** |       |
| **4** |       |
| **5** |       |
| GOOD REFERRALS:      |
| **6** |       |
| **7** |       |
| **8** |       |
| BAD REFERRALS:      |
| **9** |       |
| **10** |       |

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| **Contact Sphere Planning Worksheet** |  | **Contact Sphere Top 3** |
| **1** |       | **6** |       |  | What 3 professions would help you round out your contact sphere? |
| **2** |       | **7** |       |  | **1** |       |
| **3** |       | **8** |       |  | **2** |       |
| **4** |       | **9** |       |  | **3** |       |
| **5** |       | **10** |       |  | Make a commitment to your one-on-one partner to help fill their Contact Sphere by inviting people to BNI that are in their TOP 3!!! |
| Contact Spheres are made up of businesses or professions that naturally provide a source of referrals for one another. They are a related, but non-competitive businesses. Businesses in your SAME contact sphere have a symbiotic relationship and can support and enhance each-others’ businesses. |

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| **Easiest Way to Introduce Me:**(Questions to ask or things to listen for) |       |