

## PNA ONE-ON-ONE MEETING GUIDELINES

DATE: \_\_\_\_\_

MET WITH: \_\_\_\_\_

1. Identify your three or four ideal referral sources. Remember, an ideal referral source is someone that can lead you to numerous clients.

- 1.
- 2.
- 3.
- 4.

2. Share your contacts in order to identify who might be an ideal referral source with your partner.

- |    | <u>Name</u> | <u>Phone #</u> |
|----|-------------|----------------|
| 1. |             |                |
| 2. |             |                |
| 3. |             |                |

2. Who are three individuals or companies that you would most like to meet with?

- 1.
- 2.
- 3.

3. Please highlight two or three aspects of you or your business that make you unique.

- 1.
- 2.
- 3.

4. Who are your three best clients? (In other words, what type of person or profession)

5. What are good trigger phrases or words that should lead me to think about you and/or your business?

Share with one another your contact list in an attempt to give at least five referrals to one another within the next five days. If you have any questions about one-on-one meetings and this form, please contact Scott Brook at (954) 757-5551.