

REFERRALS CHECKLIST

- Clients:
 - Current clients—buyers and important others.
 - Past clients—buyers and important others.
 - Pending or unsuccessful clients¹—buyers and important others.
- Professional contacts:
 - Attorney, accountant, printer, designer, dentist, doctor, and others.
 - Trade association colleagues.
 - Past and present alliance partners, collaborators, subcontractors.
- Civic and social contacts:
 - Family and extended family.
 - Town boards and social contacts.
 - Athletics and recreation involvement (e.g., Little League, Girl Scouts).
 - Children's school affiliations (e.g., PTA, drama club, field trips).
 - Charities, nonprofits, pro bono work.
- Other:
 - Internet connections.
 - Political and fund-raising colleagues.
 - Hobbies and interest groups (teaching, hiking, stamp collecting, etc.).
- Planning:
 - Record in your calendar to methodically mine potential referrals list at intervals (e.g., quarterly).

¹If you have reached the proposal stage only to be turned down, you nonetheless have a good relationship with a buyer (and others you've met). There is nothing wrong with asking for referrals, which may be readily granted to atone for the guilt of having rejected your proposal!

- Send thank-you note for all referrals, whether worthwhile or not.
- Reciprocate, unasked, with referrals to your list.
- Track best sources and highest quality, and focus on those more frequently.