

One-to-One Meetings

The One-to-One Meeting information below, is a great tool to use to get to know other members outside of your regular meetings. The better rapport you have with each member, the more referrals you will both be able to give to each other. By systematically developing your relationships with each other, you will also be systematically developing your referrals in future meetings.

Use this One-to-One Planner to plan and conduct your One-to-One meetings. Keep original copies of your worksheets, ready to email to the person you will meet with next.

Get to Know Your Members and Increase Your Referrals

Instructions:

1. Complete each section of this form. You only need to do this once!
2. Save it with a unique file name on your computer
3. Email to your one-to-one meeting partner before your next meeting.

One-to-One Planner

Overall Strategy

It's as simple as scheduling one or 2 meetings a month with one of your members.

1. Set Time and Date

Your office or theirs (preferred) Restaurant or Coffee Shop

Pick a time to meet! It is better if you meet at the meeting partner's office because you can learn more about their business.

2. Prepare Your Worksheets

Member's Biography

Profile worksheet

Take the time to prepare your One-to-One Meeting Worksheets. The worksheets will help you share important information with your meeting partner about your business and how to find referrals for you.

3. Exchange Information before the Meeting

Email your worksheets to your meeting partner before your meeting. If you are meeting with many members, keep the originals handy, email them to the next person on your list a week ahead of time.

4. Bring Worksheets to One-to-One

Bring the same materials to your One-to-One meeting that you emailed earlier. You can also bring other materials that will help you help each other. For example, you can bring testimonials from your customers or your client listing to share if appropriate.

5. Meet with Your Partner

Meet with your meeting partner and learn as much as possible about how to find referrals for them.

Use the worksheets as a way to get started.

6. Commit and Agree on Goals

One short-term referral

One long-term referral

Meet again when?

In Conclusion...

Make a commitment to help your meeting partner with referrals, both short-term and long-term. If you met at someone's office, plan to meet at the other person's office next time.

It's as simple as scheduling one meeting a week with one of your members!

Profile Worksheet

Name: _____

Date: _____

Goals:

Goals are the financial, business, educational, and personal objectives you want or need to meet for yourself and for people who are important to you. The best way to develop a relationship is by helping someone achieve something that's important to them. If you do, they'll remember you when you need help achieving your goals.

Networks:

How would it benefit you to know exactly what other networks, both formal and informal, that your fellow members are involved with? A network could be an organisation, institution, company, religious, or professional associations, etc.

Interests:

Your interests – the things you enjoy doing, talking about, listening to or collecting – can help you connect with others. People are more willing to spend time with those you share their interests or know something about them.

Accomplishments:

Some of your best insight into others comes from knowing what goals they have achieved, what projects they've completed, what they have accomplished both for themselves and others. Your fellow member's knowledge, skills, experiences, values and beliefs can be surmised from their achievements.

Skills:

As for skills, the more you know about the talents, abilities, and assets of the people in your network, the better equipped you are to find competent, affordable service when you or someone you know needs help.

How well do you know the people you want to include in your network? Chances are you have a little work to do. Spend more time with the people you already know and concentrate on learning these five essentials - their goals, accomplishments, interests, networks and skills. Make sure you give back the same kind of information. The more they know about you, the faster your name will come to mind when an opportunity arises in which your products, services, knowledge, skills or experience might play a part.

Member Biography

Attendees: _____

BUSINESS INFORMATION

Business Name: _____

Profession: _____

Location: _____ Years in This Business: _____

Previous Jobs: _____

PERSONAL INFORMATION

A. Spouse _____

B. Children _____

G-Kids / pets _____

Hobbies: _____

Interests : _____

City of residence: _____ How Long: _____

MISCELLANEOUS

My desire is to achieve: _____

Something that is not known about me: _____

My key to success _____