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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** |  | |  | | --- | |  | |  | |  | |  | |  | | |  | |  | |  | | |  | |  | | 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) |  |