

# PROFESSIONAL REFERRALS OREGON COFFEE BREAK PLANNER



## Professional Referrals Oregon

*"INCREASING THE BUSINESS OF OUR MEMBERS THROUGH FORMING PROFESSIONAL RELATIONSHIPS AND SHARING QUALIFIED REFERRALS"*

### **INCREASE YOUR REFERRALS BY GETTING TO KNOW PRO MEMBERS**

**PRO COFFEE BREAKS** – *Coffee breaks are one-to-one time held by two members outside of the weekly PRO meeting. It's your chance to sit down and get to know and trust your fellow PRO members better. Each member should use the time to get to know the other's strength and business expertise, for the purpose of finding potential leads or referrals for one another.*

**USE THIS PLANNER AS A TOOL FOR CONDUCTING COFFEE BREAK MEETINGS WITH PRO MEMBERS**

**COMPLETE THESE WORKSHEETS YOURSELF – FOR YOUR OWN BUSINESS**

**KEEP ORIGINAL COPIES OF YOUR OWN COMPLETED WORKSHEETS HANDY AND READY TO SHARE WITH MEMBERS YOU MEET WITH.**

**AS YOU CONDUCT COFFEE BREAKS, YOU WILL SHARE THESE COMPLETED SHEETS WITH ONE ANOTHER. TAKE NOTES!**

**THIS PLAN INCLUDES THE FOLLOWING ITEMS:**

1. **COFFEE BREAK PLANNER – GENERAL TIPS**
2. **COFFEE BREAK SCHEDULER – USE THIS TO SCHEDULE AND TRACK – MAKE SURE YOU'RE MEETING WITH EVERY PRO MEMBER OVER TIME**
3. **MEMBER INFO SHEET – BASIC INFO TO GET STARTED**
4. **DETAILED WORK SHEET – DIGGING DEEPER**



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***THE MORE WE KNOW ABOUT ONE ANOTHER, THE EASIER IT WILL BE TO REFER TO ONE ANOTHER....  
THE FASTER YOUR NAME WILL COME TO MIND WHEN YOU ENCOUNTER SOMEONE WITH A NEED....***

- ❖ **SCHEDULE!** ***WHEN AND WHERE? CONSIDER MEETING AT THE OFFICE OR PLACE OF BUSINESS FOR ONE OF THE TWO OF YOU – IT’S A GREAT CHANCE TO LEARN MORE ABOUT ONE ANOTHER’S BUSINESSES. HOWEVER, YOU WILL NEED A PLACE FOR UNINTERRUPTED CONVERSATION.***
  
- ❖ **PREPARE!** ***IF YOU TAKE THE TIME TO PREPARE THE ATTACHED WORKSHEETS YOUR COFFEE BREAK WILL LIKELY STAY ON TRACK AND YIELD GREAT RESULTS. YOU MIGHT CONSIDER COMPLETING AND SENDING THESE PAGES TO YOUR COFFEE BREAK PARTNER BEFORE YOU MEET. THEN, AT THE COFFEE BREAK, YOU CAN EXCHANGE FORMS AND TAKE NOTES...***
  
- ❖ **MEET!** ***BE SURE TO TAKE YOUR COMPLETED WORKSHEETS WITH YOU TO THE COFFEE BREAK. BRING ALONG ANY ADDITIONAL MATERIALS THAT WILL ASSIST IN EDUCATING YOUR COFFEE BREAK PARTNER MORE FULLY ABOUT THE BUSINESS YOU CONDUCT. LEARN ALL YOU CAN DURING THIS MEETING. FIND OUT HOW TO GIVE REFERRALS TO THE PERSON YOU ARE MEETING WITH.***
  
- ❖ **FOLLOW-UP!** ***COMMIT TO HELPING ONE ANOTHER THROUGH PASSING QUALIFIED REFERRALS. INVITE GUESTS TO VISIT PRO WHO MIGHT BECOME GREAT REFERRALS FOR THIS PERSON. BECOME A REFERRAL SLEUTH! LOOK FOR BOTH BUSINESS AND CLIENT CONNECTIONS FOR YOUR COFFEE BREAK PARTNER.***



**PLAN.. SCHEDULE,,,BE SYSTEMATIC...  
... MEET WITH EVERY PRO MEMBER!**

**THE BETTER YOUR RAPPORT WITH FELLOW PRO MEMBERS, THE MORE REFERRALS YOU WILL BE ABLE TO GIVE TO ONE ANOTHER!**

**USE THE SCHEDULER BELOW TO SCHEDULE & TRACK YOUR PRO COFFEE BREAKS.  
SCHEDULE WITH EVERY PRO MEMBER...**

	DATE/TIME	LOCATION	MEETING WITH
WEEK 1			
WEEK 2			
WEEK 3			
WEEK 4			
WEEK 5			
WEEK 6			
WEEK 7			
WEEK 8			
WEEK 9			
WEEK 10			
WEEK 11			
WEEK 12			
WEEK 13			
WEEK 14			
WEEK 15			
WEEK 16			



**PRO MEMBER INFO SHEET**  
 (COMPLETE AND TAKE TO YOUR COFFEE BREAK)

**NAME:** \_\_\_\_\_  
**DATE:** \_\_\_\_\_

**ABOUT MY BUSINESS**

My BUSINESS Is: \_\_\_\_\_  
 LOCATION: \_\_\_\_\_ HOW LONG: \_\_\_\_\_  
 OTHER BUSINESS EXPERIENCE : \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**ABOUT ME**

FAMILY INFO: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 HOBBIES: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 OTHER ACTIVITIES, MEMBERSHIPS, AND INTERESTS: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 THE BEST WAY FOR OTHERS TO INTRODUCE ME IS: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**HOBBIES, INTERESTS & SKILLS**

WHAT DO YOU LIKE TO DO IN YOUR SPARE TIME? DO YOU HAVE A SECRET, HIDDEN TALENT? IS THERE SOMETHING YOU'RE REALLY GOOD AT THAT WE DON'T KNOW ABOUT? DO YOU READ? PLAY SPORTS? LIKE MUSIC? HIKE? DRAW? ARE YOU A GREAT TEACHER? SPEAKER? DO YOU ADORE KITTENS? TELL US ABOUT YOURSELF!

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**NETWORKS**

WHAT OTHER FORMAL & INFORMAL NETWORKING OR ORGANIZATIONS ARE YOU INVOLVED IN? WHERE DO YOU MEET PEOPLE?

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**ACHIEVEMENTS**

WHAT HAVE YOU ACHIEVED? BRAG A LITTLE – IT'S OK - IT HELPS OTHERS TO GET TO KNOW YOU, AND TO RECOGNIZE SKILLS YOU MAY HAVE THAT COULD LEAD TO REFERRALS!

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**VISION/GOALS**

WHAT ARE YOUR GOALS? WHAT PERSONAL OR BUSINESS OBJECTIVES ARE MOST IMPORTANT TO YOU? AS WE MOVE TOWARD OUR OWN GOALS, AND ASSIST SOMEONE ELSE IN REACHING THEIRS... EVERYONE WINS!

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**BEST BUSINESS CONNECTIONS**

WHAT BUSINESSES OR PROFESSIONS WOULD BE A NATURAL "FIT" FOR YOURS? ARE THERE SOME THAT ARE NON-COMPETITIVE, BUT NATURALLY COMPLEMENTARY OR RELATED?

THESE ARE BUSINESSES/PEOPLE THAT FELLOW PRO MEMBERS COULD INVITE TO ATTEND A MEETING. THIS COULD LEAD TO PARTNERSHIPS THAT WOULD BRING YOU REFERRALS.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

WHICH OF THESE WOULD BE YOUR MOST DESIRED CONTACTS?

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**BEST CLIENT CONNECTIONS**

HELP PRO INCREASE THE NUMBER OF REFERRALS YOU RECEIVE BY HELPING US UNDERSTAND HOW TO FIND YOUR IDEAL CLIENT.

IS THERE A CERTAIN MARKET? IS THERE A SPECIFIC POSITION YOU ARE TARGETING?

DESCRIBE A FEW OF YOUR BEST, RECENT CLIENTS/CUSTOMERS. (YOU DON'T HAVE TO LIST NAMES – JUST GENERAL DESCRIPTIONS OR CHARACTERISTICS)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

WHERE DID THESE CUSTOMERS COME FROM? WHAT DID YOU DO FOR THEM?

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DESCRIBE A GOOD REFERRAL FOR YOU.

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WHERE MIGHT WE FIND THESE REFERRALS?

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