



SOLID

executive, Inc.

Coaching • Training • Consulting

**SERVICE
ORGANIZATION
LEADERSHIP
INTEGRITY
DESIGN**

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SOLID Client Referral

Today's Date: _____ Date OK to call: _____

Contact: _____

Company: _____

Phone: Office _____ Mobile _____

Email: _____

Title: _____

Background: _____

Comments: _____

Referred by: _____ Phone: _____

Company: _____ Position: _____

Current Client Inactive Client Network Client Other: _____

In Data Base Add to Data Base Change Data Base

Use Referral Name: Yes: No

Circle	Date	Potential Client Instructions
		Create potential Client folder (Manilla)
		Send ___ Bio ___ request telephone meeting via email
		Schedule ___ 10 minute telephone call ___ Coffee ___ Breakfast
		Confirm Appointment
		Send ___ Confidentiality Agreement ___ Client Background Form
		Get ___ Bio ___ Client's company information ___ other
		Schedule ___ 1.0 ___ 1.5 Session
		Confirm Appointment
		___ Update database ___ add to newsletter
		___ Type up Scope of Work ___ email ___ put in CSR
		Type proposal and send ___ Career ___ Executive
		Send gift to reference source ___ book ___ other

