

How to Correctly Fill Out a Referral Slip

BNi REFERRAL SLIP
Business Network Int'l.

Date: _____

From: _____

To: _____

Referral: _____

Address _____
 City, State, Zip _____ Phone _____
 E-mail Address _____

Given your card Told them you would call

Comments: _____

How Hot is it?
CIRCLE ONE 5-0-0-0

5
4
3
2
1

Hot ↑
Tepid ↓

White - To
 Pink - Chapter
 Yellow - From

Copyright © 2003, BNi
 All Rights Reserved

FORM No. 0287

DEFINITION OF A REFERRAL:
 A REFERRAL is waiting for your call with anticipation.

The date needs to be the date of the meeting you submit the slip -- NOT the date of the activity.

The "Thermometer" should be filled out for every REFERRAL.
 This should be your perception of the quality of what you are passing.

The contact info is important for referrals because it helps establish that this is a REFERRAL instead of a LEAD.

The color of the slip you submit to the chapter is very important.
 PINK is to be used for referrals and guests.
 WHITE is for everything else.
 YELLOW is for your records.
DO NOT SUBMIT ALL THREE SLIPS!

Referrals and Guests are eligible for a door prize. That is why those are PINK.

This section should be used to provide additional details and verify this as a REFERRAL instead of a LEAD.

Believe it or not....
 Some people forget to put their own name down. This space is where YOUR name goes.

This is where you enter:
 -The person you are giving the referral to.
 -The name of your guest.
 -The person you had a one-on-one with.
 -The specific training you attended (such as Member Success, Leadership, Round Table, etc.).

If this is a REFERRAL, the referrees name goes here.
 If this is a ONE-ON-ONE, write "1-1", "OoO" or "1/1", etc. here.
 If this is a TRAINING, write "Training" here.
 If this is a guest, write "Guest" or "Visitor" here.