

# CAFFEINATED MOMENT *Final Form*

NAME

As you may already know, my company is \_\_\_\_\_

we have/are \_\_\_\_\_

BACKGROUND

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PRODUCT/  
SERVICE

My company offers \_\_\_\_\_

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COMPETITOR

So, you know about \_\_\_\_\_ right?

VALUE/FACTS

Well, this is how we are different \_\_\_\_\_

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INDUSTRY

Our market is \_\_\_\_\_

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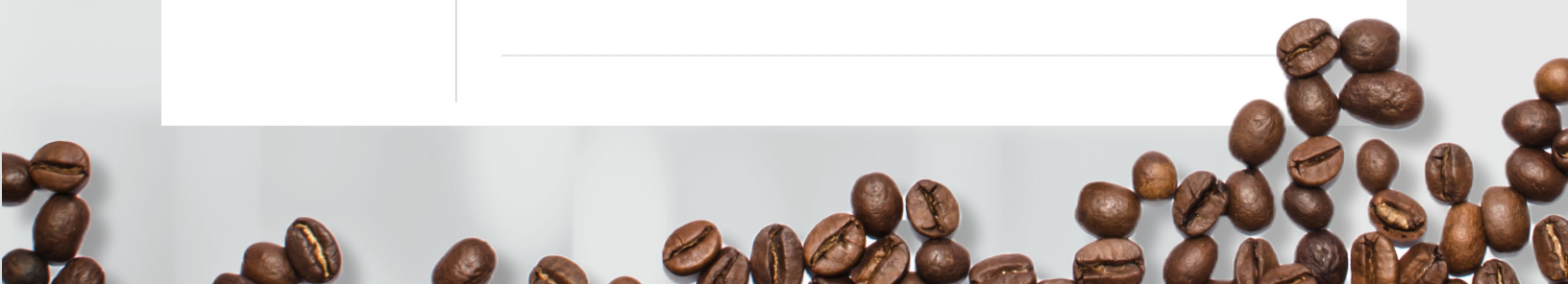
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DELIVERY

We typically deliver to our market by \_\_\_\_\_

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"WHEELHOUSE" LIST *Personal Care*

Chiropractor:		
Cosmetic & Skin Care:		
Personal Trainer:		
Nutritional Products:		
Message Therapist:		
Dentist:		
Spa/Salon:		
Dietitian or Nutritionist:		
Life Coach:		
Optometrist:		
Therapist:		



“WHEELHOUSE” LIST *Marketing & Branding*

Business Consultant:		
Graphic Designer:		
Promotional Products:		
Website Design:		
Printer:		
Bulk Mailing:		
Sign Shop:		
Trade Show Coordinator:		
Business/Magazine Publications:		
Marketing Consultant:		
Public Relations:		



"WHEELHOUSE" LIST *Family Services*

Day Care:		
Veterinarian:		
Funeral Planning:		
Assisted Living:		
Pet Grooming/ Boarding:		
Educational Products:		
Nursing Home:		
Automotive Sales:		
Automotive Repair:		
Dry Cleaning/ Laundry:		
Education/Tutor:		



"WHEELHOUSE" LIST *Real Estate Services*

Mortgage Broker:		
Real Estate Agent (Residential):		
Real Estate Agent (Commercial):		
Title Company:		
Appraiser/ Inspector:		
Blinds/Window Treatments:		
Auctioneer:		
Moving Company:		
Security Systems:		
Interior Decorator:		
Leasing Agent :		



"WHEELHOUSE" LIST *Events/Weddings*

Event Planner:		
Florists:		
Gift Baskets:		
Photographer:		
Videographer:		
Travel Agent:		
Hair Stylist:		
Caterer:		
Limousine Service:		
Formal Apparel:		
DJ:		
Haberdashers/Pro Clothiers:		



"WHEELHOUSE" LIST *Business Support*

Accountant/CPA:		
Attorney General/ Business Law:		
ISP:		
Business Marketing Consultant:		
Computer Consultant:		
Office Equipment:		
Telecommunication Systems:		
Payroll Services:		
Staffing Agency:		
Network Administrator:		
Office Supplies:		
Lawyer:		



“WHEELHOUSE” LIST *Insurance/Financial*

Accountant/CPA:		
Insurance Long Term Care:		
Insurance Home & Auto		
Insurance Health & Life		
Insurance Commercial:		
Insurance Supplemental:		
Employee Benefits:		
Personal Banking:		
Financial Planning:		
Attorney Family Law:		
Attorney Estate Planning:		
Financial Advisor:		





“WHEELHOUSE” LIST *Contractors*

HVAC Heating & Cooling:		
Carpeting/ Flooring:		
Carpet Cleaning:		
Residential/ Commercial Cleaning:		
Landscaping:		
Handyman:		
General Contractor:		
Roofing:		
Siding/Windows:		
Electrician:		
Plumber:		
Property Developer:		



"WHEELHOUSE" LIST *More*




# 60 SECOND ELEVATOR SPEECH *Blueprint*

GREETING

Good \_\_\_\_\_ I am \_\_\_\_\_

NAME & COMPANY

\_\_\_\_\_ with \_\_\_\_\_

ATTENTION GRABBER

What makes your company stand out

WHAT DO YOU DO?  
Give 3 examples

COMPETITORS  
List 4 or 5

DESCRIBE YOUR PRODUCT/  
SERVICE Entice people to try/buy

INTRODUCTIONS  
List up to 4

IDEAL REFERRAL  
Be specific

THANK EVERYONE!  
Especially who invited you





# 30 SECOND ELEVATOR SPEECH *Blueprint*

GREETING

Good \_\_\_\_\_ I am \_\_\_\_\_

NAME & COMPANY

\_\_\_\_\_ with \_\_\_\_\_

ATTENTION GRABBER

What makes your company stand out

CLARIFY WHAT YOU DO AND GIVE 1 EXAMPLE

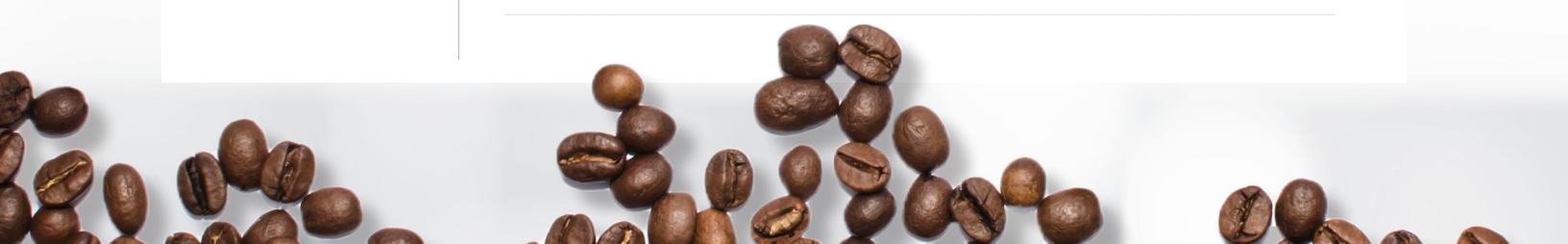
COMPETITORS  
List at least 1

DESCRIBE YOUR PRODUCT/  
SERVICE. Entice people to try/buy

INTRODUCTIONS  
List up to 1

IDEAL REFERRAL  
Be specific

THANK EVERYONE!  
Especially who invited you



# WHAT'S YOUR STORY *Questionnaire*

1. Their answer helps you relate to them better. Ex. if they are from a small, rural area, you may be able to talk about farming, etc. People normally enjoy sharing about themselves.

2. This shows you if they are an only child or if they are from a big family. In addition to helping you relate to them, this will also give you some insight into their upbringing. An only-child will act differently than someone with many siblings.

3. This is a chance for them to share about their personal life, gives you insight into their family/spouse relationships, and it gives an opportunity for you to relate to one another. Also, this may be a chance for a double dating opportunity with spouses to get to know them better.

4. This can show you how successful one's business is. Ex. If you are very successful you may want your spouse/partner to stay home because you can afford it. It can also tell you how important family is to them. If they want their spouse/partner to stay home and take better care of the kids. This gives you another opportunity to ask if their spouse/partner is looking for a chance to make their own money while at home.)

5. A great opportunity to relate to one another as parents, sharing about the joys and challenges of raising children.

6. This gives insight into how they handle relationships, and if they are family-oriented or not.

7. This shows their mindset-- if they are the first one in the family to own a business. Is it a struggle for them as they are the oddball or black sheep of the family or is the family excited and supportive of them? It helps you relate to them and it reinforces their family dynamic.

8. This tells you if they own the business or if they're an employee for a company.

9. Storytime! This is an opportunity for you to get to know more about their business, their story, why and how they started their business. This is your time to sit and listen. Take notes on their story. If something is unclear at this point, be sure to ask.

10. This basically tells you what target market they are focused on.

NAME \_\_\_\_\_ DATE \_\_\_\_\_

BUSINESS NAME \_\_\_\_\_

1. Where are you from? \_\_\_\_\_
2. How many siblings \_\_\_\_\_
3. Are you married or partnered, if so how long and how did you meet? \_\_\_\_\_
4. What does your spouse/partner do? \_\_\_\_\_
5. Do you have any kids, if so how many? \_\_\_\_\_
6. Are you close to your siblings in terms of proximity and also relationship? \_\_\_\_\_
7. Are you the first business owner or entrepreneur in your family?  
\_\_\_\_\_
8. What is the name of your business or the company you work for? \_\_\_\_\_
9. What do you/you all do? \_\_\_\_\_
10. Do you do residential or commercial?
  - Residential
  - Industrial
  - Commercial
  - Stay-at-Home Moms
  - B2C (Business to consumer)
  - B2B (Business to business)
  - Other: \_\_\_\_\_



# WHAT'S YOUR STORY *Questionnaire*

11. This will tell you if you are personally able to service their needs in that area or if their needs are on a bigger scale than your business can provide. It tells you if you personally can help them or if there is someone in your network who is more able to provide/meet their needs. It also shows you what class of people they should be connected with. Ex. If Johnny is a millionaire, I should be matching him with people who could support his business. There is a huge difference between a company that needs \$50k and a \$1 million loan.

12. Once you learn this it should help you direct them to the right source for their leads.

13. This will tell you how they are building their business currently. It will also tell you if they are satisfied in their current Networking Organization and if not, it gives you a chance to invite them to yours and broaden their network. This is a good time to ask- if they are not a part of an organization - whether they are open to joining one.

14. This tells you where they are at and their current networking experience. It ensures that you won't overwhelm them or bore them. Also note what networking means to them so you can tailor your meeting to them.

15. This is a way to relate to them in their experience. Be careful not to place judgment or "put them in a box" based on their school. In some places, there are local stereotypes attached to different schools, so be aware.

16. This is more of an investing question. There may be stock options and this can potentially be an opportunity to talk further at a later time. One of your networking partners could benefit from this question as well.

17. It's an important question because there are parameters that must be followed when a business is franchised versus independently owned.

18. This tells where they are in terms of being an entrepreneur and it opens the door for you to ask how big their network is. Example: add a story?

11. How many employees do you have?

- Employees  Independent contractors

12. Do more of your sales come from...

- Word of mouth  Referral  
 Online  Cold Calling  
 Networking  Advertising  
 Social Media

13. Are you a part of any Chambers of Commerce, which one(s)?

- BNI (Business Networking International)  IWant2Network  
 NTI (Networking Today International)  Diverse Force  
 Master Networks  Team Referral Network  
 WNA (Women's Network Australia)  PDP (Polka Dot Powerhouse)  
 The Little Black Book (Women's group)  Mastermind STL  
 N2 Thrive  CBL (Christian Business Leaders)  
 Rockstar Connect  Self-Employed group  
 Center Sphere  O'Fallon All Stars  
 WEW (Women Empowering Women)  Other: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

14. How long have you been networking? \_\_\_\_\_

15. Did you go to college and if so, where, and what did you major in? \_\_\_\_\_

16. Is your business privately owned or publicly traded? \_\_\_\_\_

17. Is your business franchised? \_\_\_\_\_

18. How long have you been in business/with your company? \_\_\_\_\_



# WHAT'S YOUR STORY *Questionnaire*

19. This question is optional, mostly for MLMers. It tells you if they are already in/comfortable with the network marketing industry and for you to potentially make recommendations.

20. This tells you if they are working on who they are and if they are interested in learning/improving/growing.

21. This can give you a chance to introduce them to something new.

22. Make sure you get their business card if you don't already have it. You want to stay connected with them. After all, the goal here is to build your audience.

23. Use this as a rating system to help you gauge how much value you added (or did not add) to their meeting. It then allows you to continually build your business according to what the market is saying, which allows eternal growth. It allows people to be the sole focus. Additionally, this is a constant ego checker because you cannot genuinely help people and have an ego.

24. You ask them this so that you can be careful not to overwhelm them but keep their schedule filled.

25. Ask this to properly fulfill the number of referrals they need while efficiently giving them the best quality referrals.

26. You are just honoring their preferences on how to be contacted

Lastly... Once the Driver goes through the questionnaire, then switch and let the other person drive. This is when you can now tell the driver how to introduce you.

19. Do you have a source of residual income, and if so which company are you with? \_\_\_\_\_

20. Do you like to read or work on personal growth and if so, what

is your preferred source? Also, what is your favorite genre?

- Hback books
- Audibles
- Kindle
- Ebooks
- Articles
- Podcasts
- Youtubers
- Conference/seminars
- Genre? \_\_\_\_\_

21. What social media platforms are you on? (Circle all that apply)

- Facebook
- LinkedIn
- Alignable
- Nextdoor
- Shapr
- Instagram
- Pinterest
- Twitter
- Snapchat
- Other \_\_\_\_\_

22. Can I add you to my social media platforms? \_\_\_\_\_

23. Would you be willing to type a review on my social sharing something that I taught you? Maybe I said something that helped you personally or perhaps I was able to increase your belief in building your business as an example? \_\_\_\_\_

24. How many Introductions can you handle per month?

- A. 1-5
- B. 6-10
- C. 11-15
- D. 16-20
- E. Other # \_\_\_\_\_

25. Who would be a great referral for you? \_\_\_\_\_

26. How would you like to receive these warm introductions?

- Messenger
- Email
- Text message
- Other \_\_\_\_\_





## NETWORKING BUDGET *Worksheet*

NETWORKING EXPENSE	AVERAGE MONTHLY COST	X12 = YEARLY COST
GAS/FUEL		
AUTO EXPENSES		
SUPPLIES		
DUES		
MEALS		
COFFEE		
ATTIRE		
MISCELLANEOUS		
TOTAL		

