

This is a three part form

White Copy goes to the person you are giving the referral to
 Yellow Copy goes to NBNA
 Pink Copy is your copy

- | | |
|--|--|
| <input type="checkbox"/> Date _____ | <input type="checkbox"/> Thank You |
| <input type="checkbox"/> Potential Business | <input type="checkbox"/> Guests |
| <input type="checkbox"/> TBI Invite | <input type="checkbox"/> TBI Completed |
| <input type="checkbox"/> Social Media Contribution | <input type="checkbox"/> Testimonial |

To: _____

From: _____

Client or Business: _____

Address: _____

Telephone: _____

Amount: _____

Comments: _____

Potential Business - You have potential business for another member. Please include the client name, business name, telephone or email address, and a brief description on what the Client needs the member to do for them.

A TBI Invite - Team Building Invitation where you are asking another member to meet with you to learn more about each other's business. The person asking for the meeting fills out the TBI Invite Section

Social Media Contribution - You have recommended another member on Facebook or some other social media. On Social Media, this recommendation should include a small testimonial about the member and include their name, business name and cell phone number or a link to their website. This can also be a Google Review. When you fill out the form please include the person's name you did the Social Media recommendation to

Thank you - Use this to thank a member for closed business. Please put the dollar amount of the business you received from another member on the form

Guest - You've brought a guest to the meeting

TBI Completed - Once you've met for a TBI with another member, you fill out this form to the member that invited you to meet and in the comments section put something you learned either about the member or their business during the meeting

Testimonial - This is where you've personally used another member's services and want to tell us how good the service was