MBX M & M Planner

(Please complete the Planner and make copies for distribution)

Date/Time	Appointment With	Location

MBX Business Profile

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Your name:	
Name of business and location:	
What services do you offer?	
Who do you serve with your product? (ideal client)	
How do you help people reach their goals?	
Why choose you instead of a competitor?	
What is a good referral for you?	
What is a bad referral for you?	
Who is your DREAM referral?	

MBX PAACE of BUSINESS

Pastimes are the things you do that are not associated with your vocation. **Pastimes** For example: reading, sports, listening to music, travel, or gardening. Pastime activities are good ways to create connections that could contribute to your referral base. Make a list of your pastimes to enable your M&M partner to get to know you better. Aims are your personal or business objectives—the things you hope to ac-**Aims** complish through your work. Knowing the aims of another MBX member is a good way to gain insight into how you might help them reach those goal/s. Be able to define your goals in clear language to another MBXer. Achievements are the things you have attained in your lifetime and are **Achievements** proud of. These can include academic awards, special licenses, awards for your work and other accomplishments. Knowing another person's achievements give excellent insight into their capability and how you can refer for her/him. **Connections** are the formal and informal associations that you have. These **Connections** can include service and civic clubs, faith-based communities, professional organizations, and organizations for which you volunteer your services. These connections represent possible referral networks. **Expertise** is all about your talents and abilities. The more you know about **Expertise** fellow MBXers' abilities, the more you will know how to refer business to them. As you talk with MBXers, ask about their respective abilities as they

will about yours.

MBX Member Biography

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	Personal Information
Your name:	
Spouse/Significant Other	
Children:	
Animals:	
Hobbies	
Activites of Interest	
	Miscellaneous
Places you have lived:	
My burning desire is to	
Something no one knows about me.	
My key to success in life:	

MBX Member Contact Spheres

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Contact Sphere

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Contact spheres are businesses or profession that serve as natural sources of referrals for you. For example, a car dealer and a car insurance provider would be contact spheres because they support each others' business efforts.

Contact Sphere Top −3!

What three professions would you like to have as fellow MBX members to round out your Impact Group?		

Make a commitment to your M & M partner to help fill their Top-3 contacts.