

Keep In Touch | Module #2

The ABC's of Your Business Relationships

1. Make a list of everyone you know.

These are past clients, colleagues, family, friends, acquaintances and anyone else you can think of. Don't filter or hold back! You never know when someone who might not be a client or referral source might trigger the memory of someone else. So write down everyone!

You'll notice that there's a small space to the right of each line. Leave that blank for now.

1. _____	17. _____
2. _____	18. _____
3. _____	19. _____
4. _____	20. _____
5. _____	21. _____
6. _____	22. _____
7. _____	23. _____
8. _____	24. _____
9. _____	25. _____
10. _____	26. _____
11. _____	27. _____
12. _____	28. _____
13. _____	29. _____
14. _____	30. _____
15. _____	31. _____
16. _____	32. _____

33. _____

54. _____

34. _____

55. _____

35. _____

56. _____

36. _____

57. _____

37. _____

58. _____

38. _____

59. _____

39. _____

60. _____

40. _____

61. _____

41. _____

62. _____

42. _____

63. _____

43. _____

64. _____

44. _____

65. _____

45. _____

66. _____

46. _____

67. _____

47. _____

68. _____

48. _____

69. _____

49. _____

70. _____

50. _____

71. _____

51. _____

72. _____

52. _____

73. _____

53. _____

74. _____

75. _____

96. _____

76. _____

97. _____

77. _____

98. _____

78. _____

99. _____

79. _____

100. _____

80. _____

101. _____

81. _____

102. _____

82. _____

103. _____

83. _____

104. _____

84. _____

105. _____

85. _____

106. _____

86. _____

107. _____

87. _____

108. _____

88. _____

109. _____

89. _____

110. _____

90. _____

111. _____

91. _____

112. _____

92. _____

113. _____

93. _____

114. _____

94. _____

115. _____

95. _____

116. _____

117. _____

138. _____

118. _____

139. _____

119. _____

140. _____

120. _____

141. _____

121. _____

142. _____

122. _____

143. _____

123. _____

144. _____

124. _____

145. _____

125. _____

146. _____

126. _____

147. _____

127. _____

148. _____

128. _____

149. _____

129. _____

150. _____

130. _____

151. _____

131. _____

152. _____

132. _____

153. _____

133. _____

154. _____

134. _____

155. _____

135. _____

156. _____

136. _____

157. _____

137. _____

158. _____

- 159. _____
- 160. _____
- 161. _____
- 162. _____
- 163. _____
- 164. _____
- 165. _____
- 166. _____
- 167. _____
- 168. _____
- 169. _____
- 170. _____
- 171. _____
- 172. _____
- 173. _____
- 174. _____
- 175. _____
- 176. _____
- 177. _____
- 178. _____
- 179. _____
- 180. _____
- 181. _____
- 182. _____
- 183. _____
- 184. _____
- 185. _____
- 186. _____
- 187. _____
- 188. _____
- 189. _____
- 190. _____
- 191. _____
- 192. _____
- 193. _____
- 194. _____
- 195. _____
- 196. _____
- 197. _____
- 198. _____
- 199. _____
- 200. _____

- 201. _____
- 202. _____
- 203. _____
- 204. _____
- 205. _____
- 206. _____
- 207. _____
- 208. _____
- 209. _____
- 210. _____
- 211. _____
- 212. _____
- 213. _____
- 214. _____
- 215. _____
- 216. _____
- 217. _____
- 218. _____
- 219. _____
- 220. _____
- 221. _____
- 222. _____
- 223. _____
- 224. _____
- 225. _____
- 226. _____
- 227. _____
- 228. _____
- 229. _____
- 230. _____
- 231. _____
- 232. _____
- 233. _____
- 234. _____
- 235. _____
- 236. _____
- 237. _____
- 238. _____
- 239. _____
- 240. _____
- 241. _____
- 242. _____

243. _____

247. _____

244. _____

248. _____

245. _____

249. _____

246. _____

250. _____

2. Defining the ABC's (and D's)

The next step is to identify the strength of your current connection/relationship with each person on the list you just created. Let's define it first.

*Note: You can also find these definitions in *The Referral of a Lifetime* on pages 45-46.*

A's Most likely to refer you.

They are your advocates or champions. When you see them, they say hello to you like an old friend.

B's You think they can champion your cause and refer you if you educate them about how you work.

You want to learn more about them and proactively build a relationship. The focus is for them to become A's

C's You're not sure about them, but want to keep in contact with them.

You might have just met them, but you've exchanged business cards or maybe you've known them for a while but haven't talked. You're not sure whether they'll champion or refer you, even after proper communication, but you hope they will.

D's Delete or Defer

You're certain you don't want to pursue a business relationship with them.

3. Who are your ABC's? (and D's)

Go through your list and in the space to the right of each name label them as A, B, C or D.

4. Your Contact System

Do you currently have a system for keeping track of people you meet? Or what do you see yourself using?

Your contact system should allow you to easily accomplish the following tasks:

1. **Track your conversations.**

You want to be able to make a couple of notes about what you talked about or what you might want to ask them about next time you talk.

2. **Find and update their information.**

For example, if someone in your contact system calls you unexpectedly, how quickly can you find his or her information? Being able to find this quickly will allow you to know what you talked about last time and know any questions you wanted to ask them (like how that vacation they took went).

3. **Easily enter information.**

4. **Easily identify who you are calling today (or this week) and why you're calling.**

I used a spreadsheet for this purpose for over two years. You received an example of that spreadsheet with this module. Make this tool your own or model it for the system you create.

Currently I use a contact management system called Contactually. If you'd like to check it out you can sign up for a free 30-day trial [here](#) (this is a referral link, should you decide to sign up I receive a small compensation. However, I never recommend something I don't fully endorse).

4. Enter Your List into Your Contact System

You have your list on paper, however, you haven't asked for permission to reach out to them on a regular basis. I believe it is very important to receive permission before you start keeping in touch by sending letters, cards or notes at regular intervals.

So, to keep track of who you have received permission from, I've added a few additional categories to ABC and D:

E's You don't know this person well enough to know whether they're an A, B, C or D.

You might have just met them at an event where everyone's business cards were passed around. You didn't speak to them or meet them directly and you're entering their information into your database in case you meet them again somewhere.

F's This person did not give you permission to keep in touch with them by sending them letters, cards or notes at regular intervals.

This is different from a D because you can still keep in touch with them over the phone or maybe through a newsletter (if you have one). You also might want to add a note to their information in your Contact System with the reason they declined, if one was provided.

X's You don't have enough information about them to contact them.

You might have met briefly at a networking event, but didn't have a chance to exchange cards. Or you didn't meet them directly but heard them introduce themselves to the group and wanted to capture that you met or were at the same event.

AE's Your A's that you don't have permission to reach out to them on a regular basis.

BE's Your B's that you don't have permission to reach out to them on a regular basis.

CE's Your C's that you don't have permission to reach out to them on a regular basis.

Now, you're ready to start entering your 250 contacts into your Contact System *(I like to enter all my business contacts, even the D's because if I don't I'll forget why they're not there).*

Note: Please rename these categories to what works for you. My E's and X's are now both referred to as Unknown. Unknown meaning that I don't know enough about them right now to decide if I'd like to learn more, but I do want to capture that we have met.

Easy Reference ABC's

The definitions in one place for easy reference.

Note: You can also find the first four definitions in The Referral of a Lifetime on pages 45-46.

A's Most likely to refer you.

They are your advocates or champions. When you see them, they say hello to you like an old friend.

B's You think they can champion your cause and refer you if you educate them about how you work.

You want to learn more about them and proactively build a relationship. The focus is for them to become A's

C's You're not sure about them, but want to keep in contact with them.

You might have just met them, but you've exchanged business cards or maybe you've known them for a while but haven't talked. You're not sure whether they'll champion or refer you, even after proper communication, but you hope they will.

D's Delete or Defer

You're certain you don't want to pursue a business relationship with them.

E's You don't know this person well enough to know whether they're an A, B, C or D.

You might have just met them at an event where everyone's business cards were passed around. You didn't speak to them or meet them directly and you're entering their information into your database in case you meet them again somewhere.

F's This person did not give you permission to keep in touch with them by sending them letters, cards or notes at regular intervals.

This is different from a D because you can still keep in touch with them over the phone or maybe through a newsletter (if you have one). You also might want to add a note to their information in your Contact System with the reason they declined, if one was provided.

X's You don't have enough information about them to contact them.

You might have met briefly at a networking event, but didn't have a chance to exchange cards. Or you didn't meet them directly but heard them introduce themselves to the group and you want to learn more.

AE's Your A's that you don't have permission to reach out to them on a regular basis.

BE's Your B's that you don't have permission to reach out to them on a regular basis.

CE's Your C's that you don't have permission to reach out to them on a regular basis.