

**Small Business Insurance & The Internet**

*The Voice of the Commercial Lines Customer  
Research From the PIA Partnership*

**GETTING EVERYONE WORKING TOGETHER**



**REFERRALS PLANNING WORKSHEET**

**INDIVIDUALS INVOLVED IN PLANNING** **TARGET DATES**

Name: _____	Date Planning Started: _____
Name: _____	Date Plan Review: _____
Name: _____	Date Plan Completion: _____
Name: _____	Date Activity Starts: _____
Name: _____	Date Activity Completed: _____

**HOW WILL YOU BE ASKING FOR REFERRALS?**

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**WHEN WILL YOU BE ASKING FOR REFERRALS?**

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**WHO IN THE AGENCY WILL BE INVOLVED?**

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**ACTION STEPS**

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**ASSIGNMENTS**

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