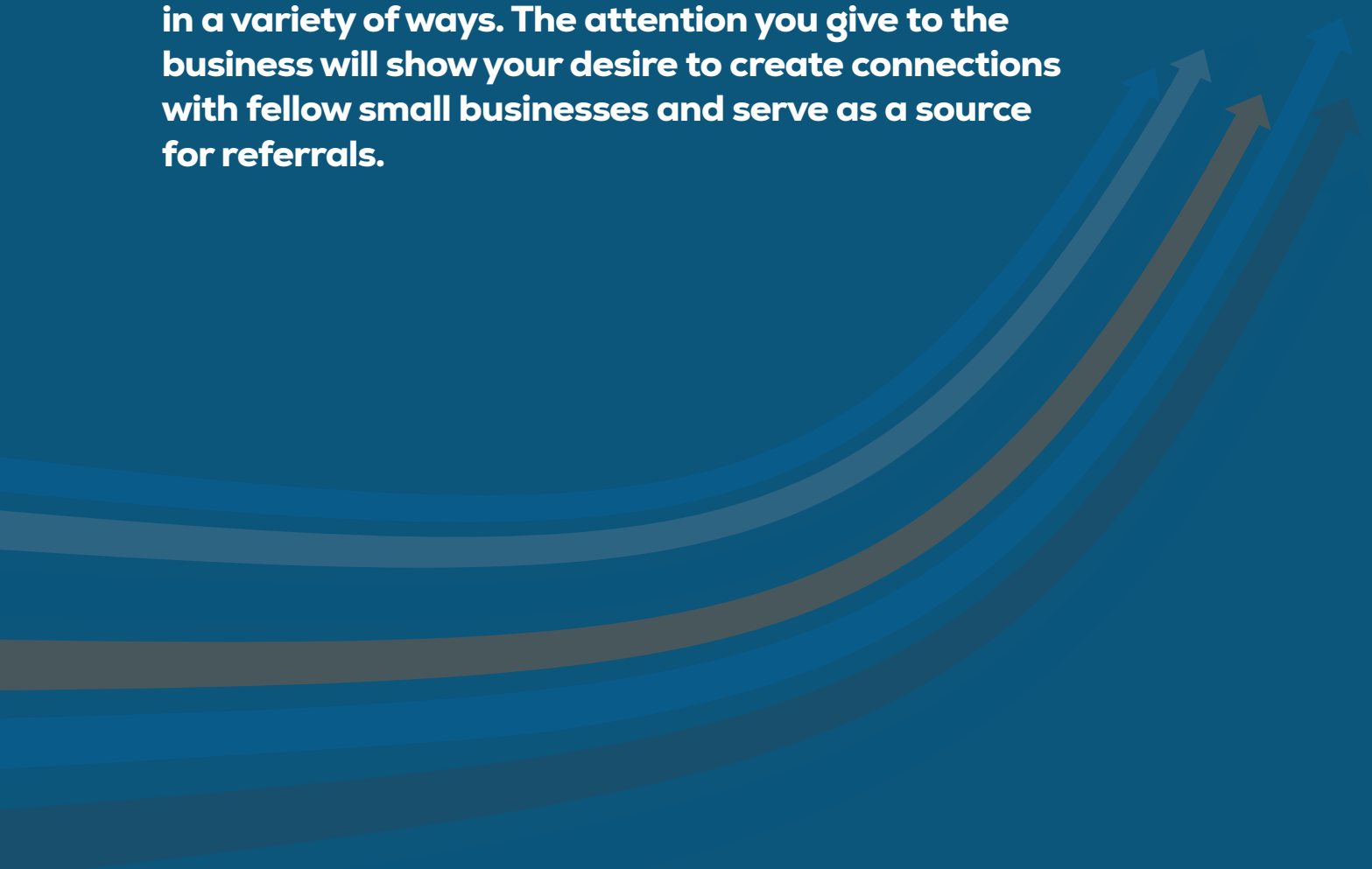




Networking Touchpoints Checklist

Use this checklist to connect with local businesses in a variety of ways. The attention you give to the business will show your desire to create connections with fellow small businesses and serve as a source for referrals.



Networking Outreach Touchpoints

This list is your roadmap for connecting with other businesses (what we call Key Relationships) throughout the year. When you've completed an activity for a Key Relationship business, check it off the list.

Keep notes about your interactions with each business you contact. Thorough notes will help inform each future touchpoint and help you build a connection with this business.

In-Person Visits

- ☐ All About Them Visit
- ☐ Handwritten Thank You Card for 1st Visit
- ☐ Learn More Visit: Getting Personal
- ☐ Follow-Up Text for Learn More Visit
- ☐ Strengthening the Conversation Visit
- ☐ Follow-Up Text for Continued Visits

Online Reviews

- ☐ 5-star Google review
- ☐ Email Notification of Google Review
- ☐ Text Notification of Google Review
- ☐ Facebook Review
- ☐ Email Notification of Facebook Review
- ☐ Text Notification of Facebook Review
- ☐ LinkedIn Endorsement
- ☐ Email Notification of LinkedIn Endorsement
- ☐ Text Notification of LinkedIn Endorsement

Social Media Connections

- ☐ Like & React to the Business' Content
- ☐ Share the Business' Content
- ☐ Leave a Comment on a Post
- ☐ Tag in Relevant Posts
- ☐ Collaborate on Content
- ☐ Feature the Business in Your Content
- ☐ Participate in the Business' Campaigns
- ☐ Celebrate Milestones
- ☐ Attend and Promote Their Events

Share Your Network

- ☐ Introduce the Business to Someone in Your Network
- ☐ Email Follow-Up With an Industry Article

Collaboration & Events

- ☐ Visit Your Key Relationship - The Lunch & Learn Ask
- ☐ Visit Your Key Relationship - Community Event
- ☐ Event or Lunch & Learn Execution
- ☐ Social Media Highlight of Event
- ☐ Handwritten Thank You Card - Lunch & Learn
- ☐ Handwritten Thank You Card - Event

Other

List other touchpoints not included on any list.

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____



Networking Outreach Touchpoint Descriptions

In-Person Visits

All About Them Visit

This is an introductory visit to introduce yourself and make a first connection with the business. Use this as an opportunity to ask as many questions as possible so you better understand their goals. You also want to hear about their struggles and obstacles so you can begin thinking about how you can be of value to them.

Handwritten Thank You Card for First Visit

Follow-up your introductory visit with a handwritten thank you card expressing your gratitude for their time visiting with you.

Learn More Visit: Getting Personal

This visit serves the purpose to get to know the business owner and company a bit better. Ask questions about upcoming plans, family, what they do for fun, or any charitable organizations they are involved in.

Learn More Visit: Follow-Up Text

Follow your visit up with a text thanking them for their time.

Strengthening the Conversation Visit

Express gratitude, explore opportunities to collaborate on marketing efforts, campaigns, or community events. Offer something of value to help with one of their struggles.

Follow-Up Text for Continued Visits

Recap key points: "Hey [Key Relationship], it was great catching up earlier! I enjoyed discussing [specific topic or project]. Let's keep the conversation going and explore how we can collaborate further."

Online Reviews

5-Star Google Review

Leave the business a 5-Star Google Review. It's best to also write a short review based on your interactions so far.

Email Notification of Google Review

Send a short and sweet email to let the business know you left them a Google Review, including mention that you know how valuable Google reviews are to any business!

Text Notification of Google Review

Send a short text to notify your contact at the business that you left a Google Review.

Facebook Review/Recommendation

Leave the business a review/recommendation on their Facebook page.

Email Notification of Facebook Review

Send a short email to let the business know you left them a review on their Facebook Page.

Text Notification of Facebook Review

Send a short text to notify your contact at the business that you left a Facebook Review.

LinkedIn Endorsement

Visit the business owner/contact's LinkedIn page and give a recommendation and their area of expertise.

Email Notification of LinkedIn Endorsement

Send a brief email to let the business owner/contact know you gave them a recommendation on LinkedIn.

Text Notification of LinkedIn Endorsement

Send a short text to notify your contact that you gave them a recommendation on their LinkedIn profile.



Networking Outreach Touchpoint Descriptions

Social Media Connections

Like and React to the Business's Posts

Straightforward, 'Like' (or another positive reaction) the content the business posts on their social media accounts.

Share the Business's Post Content

Make a point to share some of the content the business posts on social media. Choose posts that are most relevant to your business.

Leave a Comment on a Post

Participate in the post engagement on the posts of the business by commenting on posts.

Tag the Business in Relevant Posts

Tag the business as it makes sense in a post on your social media page (business and/or personal accounts.)

Collaborate on Content

Share any collaborations in advance, during and after the event. Cross-promote one another so you are each visible to the other's audience.

Feature the Business in Your Content

Create a post dedicated to the business's product or service offering. Feature the owner, staff, event or anything else of appeal.

Participate in the Business's Campaigns

Show up to support the Key Relationship's business. This could be as a customer, a donor, or a volunteer. Post your involvement and support on social.

Celebrate the Business's Milestones

Help the business celebrate important milestones like a business anniversary or other notable achievement. Take them a unique/ memorable gift.

Attend and Promote Their Events

Help the business promote their events by sharing posts about the event, attend the event and post photos in real-time.

Share Your Network

Introduce the Business to Someone in Your Network

Make a warm introduction to someone in your network. Who do you know looking for the products or services your Key Relationship offers? Connect them via e-mail or in-person.

Email Follow-Up With an Industry Article

Google search an interesting or helpful article pertaining to their business. Or, when you see/read something interesting, don't keep it to yourself—share it with your Key Relationships and tell them, "I thought of you when I read this."

Collaboration & Events

Visit the Business: The Lunch & Learn Ask

In this in-person visit, discuss (and ask) about holding a Lunch & Learn at the business' location for their customers and/or other community members. You'll provide lunch (or breakfast!) in exchange for a focused audience for 30 minutes.

Visit the Business: Community Event

At this in-person visit, approach the idea of participating in a community event with the business. Do they have an upcoming event you can support? Or do they have any big ideas that you could potentially help with and split costs?

Event or Lunch & Learn Execution

Hold the Lunch & Learn or event.

Social Media Highlight of Event

Before, during and after the event post photos and express gratitude for hosting the event in partnership with the business. This will create awareness for both businesses.

Handwritten Thank You Card: Lunch & Learn or Event

Following the Lunch & Learn or Event, write a handwritten thank you card from you personally expressing your appreciation of the business/ business owner's time and cooperation hosting and/ or partnering in the event.



Notes

[illegible]