

**NetWorks! Boise Valley**

**MEMBER  
GUIDEBOOK**

**Getting the most out of your NetWorks! Boise Valley investment ...**

## Introduction

Welcome to NetWorks! Boise Valley! This document has been designed to assist you with getting the most out of your investment with the group and please make no mistake; your membership should be an investment and not an expense. Investments provide a return in excess of monies and time spent whereas expenses do not. Our goal, your goal, is to maximize your return on that investment!

We will talk about a lot of things in this document. Please be assured that I am here to assist you in any way that I can. Your success is my success!

Thank you!

Craig M. Jamieson, Managing Member  
Adaptive Business Services  
208.340.9546  
[craig@adaptive-business.com](mailto:craig@adaptive-business.com)

## Group History

It may be beneficial to provide you with a little background on how these groups began. I have been an active member of a networking group continuously since 1993. The first group that I attended was one that I started that year. That group is, in fact, still running today and may be the oldest group in the Treasure Valley. At that time, I was a partner in an electric sign company. Our group rules stated that membership rights resided with whoever paid the dues (member or company). I left my partnership, my former company paid the dues for my membership, they wanted to continue membership with the group and, despite my being the group founder ... I was out of the group and by my own hand. Such is life ☺

Still, I had seen great results from that group and knew that networking worked! When the Edwards Cinemas opened their first complex in Boise, I received an introduction to the developer as a direct result of my group membership. The initial sale was \$350,000 and was followed by at least that amount in subsequent business from that same developer alone. Pays for a lot of dues!

Over the next several years I was a member of a variety of local groups. Some were o.k. while others were mediocre at best. Regardless, I always managed to make each group pay me more in terms of commissions than I invested in group dues and time spent. Always!

For several years I had had a vision in my mind of what would constitute a truly quality group beyond that of any group that I had been exposed to. In the spring of 2007 I got serious about this and began to research and document the framework for what is now NetWorks! Boise Valley. We launched October 2007. There were several key elements that needed to be put in place.

- This would be a weekly group and would include lunch or breakfast. I had tried groups that met every other week or monthly and they did not work.
- I needed some very serious networkers to be members.
- My philosophy is that B2B companies and B2C companies typically don't mesh well in this environment due to the fact that they have different target markets. There are exceptions to this rule but, they are few. We would be B2B focused.
- I wanted to incorporate technology tools and specifically a way to track and modify shared leads that all members would have access to. Basically, a leads database. A few years earlier this might not have been possible but, with cloud computing applications now emerging, the technology was available.
- I wanted members to be responsible for one thing only and that was to show up weekly, participate, and then enjoy the benefits.

It soon became clear that, while my original goal was to just develop a group that I could belong to, in order to make everything work correctly I would need to run the group as a business and that is exactly what these groups are.

As a business, I take the success of our members, their companies, and the group extremely seriously. Your continued success is my paycheck. The services that we provide have evolved as well. Ask any original member about how we look today vs. how we looked almost nine years ago and he or she will tell you that we are quite the different animal.

I am committed to your success and am available at any time as a resource for our members. While most know me as the person who facilitates and runs the groups, my background is in B2B sales and management dating back to 1977 and during that time I have held the following positions ...

- Account Executive
- Sales Manager (multiple companies)
- District Manager
- NW Division Sales Manager
- National Sales Manager
- Partner
- Sole Proprietor (Sales Training and Consulting)
- Adjunct Faculty BSU (Sales)

Sales Results LLC is the legal entity behind NetWorks! Boise Valley. We also train and consult in selling and social selling/business applications and are a Solution Partner for Nimble Social CRM. My main business now runs under the DBA Adaptive Business Services.

## Conduct

Just as you no doubt have expectations of us, we have expectations of you. These expectations are designed to ensure your success as well as the success of your group as a whole. Please refer to the Membership Application (included in this document) for more details. Also please remember that your actions in and out of the group will be viewed by your fellow members as behavior that they would likely expect should they refer you to one of their valued clients. This will be the difference between getting those referrals and not getting those referrals. This should be a win-win. Clients love folks who connect them to valuable resources!

1. **Conduct yourself in a professional manner at all times.**
2. **Arrive on time.** We do whatever we can to start meetings promptly at 11:45 AM and end them promptly at 1:00 PM. Consistently arriving late is a sign of disrespect for the needs of the group and has a negative effect on our ability to grow the group(s). If you can't arrive on time, I will assume that you will be late to any meeting including ones with any of my clients that I might refer you to. I may even invite you to leave.
3. **Attend a minimum of 75% of the meetings.** We do allow you to designate an alternate from your company to attend in your place should you be unable to. Your alternate will be expected to abide by all group rules and ensuring that is your responsibility.
4. **Contribute a minimum of 2 good leads, referrals, or introductions weekly.** Leads must be written down on the form provided (copy in this document) and left with the group facilitator at the end of each meeting. Email leads when you can't attend.
5. **Respect member and group anonymity.** We are sharing sometimes confidential information regarding a company or a project. As such, you will never use a member name without their express permission or even disclose that the source of your information came from a networking group.
6. **Do not share this information with others!** These leads are for you and you alone! You may share them with other members of your company but, please be sure to let those people know not to share this information with people outside of your company. You will not share this information with any other individuals and particularly with any other networking group. We also take a very dim view of you bringing leads to our groups that you obtained from another networking group. If you bring leads from another group, I have no reason to assume anything other than that you are very **likely sharing our leads with other groups**. Doing so is a cause for immediate membership termination.
7. **Please pay your dues on time.** I get paid once every quarter and these groups are one of the ways that I pay my bills. Dues are paid in advance of each quarter and are payable by cash or check only. Invoices are sent out 30 days in advance of each new quarter. Your assistance in ensuring prompt payment is greatly appreciated!
8. **If you cannot make a meeting at which you are expected ...** please alert me at least 30 minutes in advance.

## Your Dues Include ...

1. The weekly meeting and your meal. We meet 48 times annually (12 weeks per quarter)
2. All of the services that you might be asked to volunteer for in a member-run group such as serving as an officer. You will not be asked to serve any post.
3. Featured places for you and your company on our website.
4. Access to your group's CRM.
5. The weekly lead report via email which includes .pdf and .xls versions of the report.
6. Opportunities to promote your business to the group.
7. We allow only one member per industry classification per group. This is your exclusive territory and you have full veto power over any potential new member who you may see as a conflict with your business. As we are locking down this slot for you, you must attend and contribute to continue to enjoy this status!
8. 25% off on my additional services
9. TriMetrix DNA Behaviors and Motivators Assessment - valued at \$280 plus one hour debrief (\$150) = \$430 less your 25% discount = \$322.50. **One for free!**
10. In-person LinkedIn profile review and tune-up - valued at \$150 less your 25% discount = \$112.50. **One for free!**
11. One 60 to 120 minute company workshop (and/or invite your clients!) **free annually**. Value of up to \$300 (\$225 with your discount). You provide the meeting space and the printing of any materials. I can accommodate up to 5 people in my office or this can also be conducted as a webinar.
12. From time to time we also may offer activities that are either wholly or partially funded by your standard dues. It is important to note that these activities **are not** a guaranteed benefit of your dues.

Approx. ½ of your weekly dues are dedicated to your meal. A portion of the remainder goes to operating expenses and the balance to the group operator in compensation for services rendered. 100% of your dues should be tax deductible (please consult your accountant). In fact, for most members this means that membership cost after lunch may be \$12.00 per week or less. That \$12.00 investment can easily return \$1,000's in revenue or even in commissions. I have personally sold well over \$1,000,000 in products as a result of networking group relationships!

## Our 90 Day Money Back Guarantee

During the first 90 days only, and providing that a new member is willing to follow certain guidelines (copy as a part of the membership application) that are designed to maximize their success, we offer a full money back guarantee of that member's first quarter dues.

If you come to me at the end of those 90 days and, **having followed the guidelines**, and you tell me "*Craig, this just did not work out for me the way that I had hoped*" ... I will write you a

check for the full amount of your paid dues for that first quarter and I will wish you well. If you follow the guidelines, I have no doubt that this conversation will never be held. If you choose to not follow the guidelines ... that becomes your problem and not mine.

### **Ensuring Your Success**

1. Attend as many meetings as possible. By attending meetings, the other members get to know you, your company, and your services. This is how relationships are created and referrals are secured.
2. Make every effort to provide good general leads as well as referrals and introductions (more on this later). Givers do get. Email leads to Craig when you can't make a meeting.
3. Thank members privately and in the group meeting for referrals and introductions that they have given you and for any leads that you may have had success with. Success breeds success and when you publicly thank another member they are going to want to refer you again!
4. When you do get a referral, be sure to advise the referring member of your progress and results.
5. Take every advantage to speak in front of the group. If speaking in front of groups is not comfortable for you, take every advantage that you get and then steal opportunities to do so from other members ☺ This is your "Toastmasters" and our meetings are a great chance to practice in front of a friendly group and in a controlled atmosphere.
6. Consider contributing guest articles on the website. These are also shared through social media.
7. Invite potential members to visit the group. This **must** be run by Craig first so that he can ensure that they would not be a conflict with an existing member and to qualify them as to their interest and ability to join. We do pay for their lunch on their one visit. Should they become a formal member, you will receive a **\$50 REWARD!** This reward even applies should you refer a new member to our other group!
8. Meet with other members off-site for coffee, lunch or breakfast, or a tasty adult beverage. This is how relationships are formed!
9. Before following up with a lead obtained from the meeting, call the member who gave the lead and ask him what else he or she may know about it. This might also lead to a personal introduction or referral!
10. Work the CRM. It is an invaluable resource!
11. Don't be afraid to work general leads. Part of the group's function is to turn "cold calls" into "warm calls". There are opportunities there for "hunters"!
12. Make your specific needs known to your other members! This might include... *"Does anybody know or have a connection to ...?"*

## What Constitutes A Good Lead?

The best leads are typically those that are not widely known but that you know at least a little something about. Ultimately, gathering suitable leads becomes a mindset and it works best when you write them down as you encounter them. Use your eyes, your ears, and your pen and paper or voice recorder. The absolute best leads include ...

- They are written down on the form and are done so legibly
- They provide as much info as possible
- There is a contact name, a phone number, and maybe an email address
- Anybody should be able to look at the lead and immediately know the gist of what the lead is about.
- **They are turned in at the end of the meeting so that they can be updated to the CRM!**

General leads where you have no personal first-hand knowledge can also be very valuable and be so for multiple members. Say you just heard that a company will be relocating and you have nothing more than that. Share that with the group! Other members will take the initiative to track that down and see if there may be an opportunity for them or for others. They should also share this updated info with the group so that this new info can be added to the CRM. **Do not “over think” who this lead might be good for. The members will sort that out!**

## Examples of General Leads

- Company looking for new space
- Company relocating
- Company coming to town
- Company expanding or contracting
- Construction sites. Dirt being moved or other activities

## Referrals and Introductions

*“I gave your name to somebody and they may be calling you” is not a referral! “I talked to Fred over at ABC Company and told him about you and he would like to speak with you and is expecting your call. Fred can be reached at 555-5555 and his email address is [fred@abccompany.com](mailto:fred@abccompany.com). Be sure to mention my name when you call him” is a good referral!*

Introductions and referrals can also be done digitally via email. Simply send an email to both parties making that introduction. Of course, making a phone call or walking your fellow member over and introducing them directly is ... DA BOMB!



## On-Line Tools and Resources

### Resources Page

Located on the main menu bar of the NetWorks! Boise website (below the blue header), this page has links to valuable resources for finding and researching leads, some great free tools, and is also where you can download: **a menu, a leads form, or a membership application.**

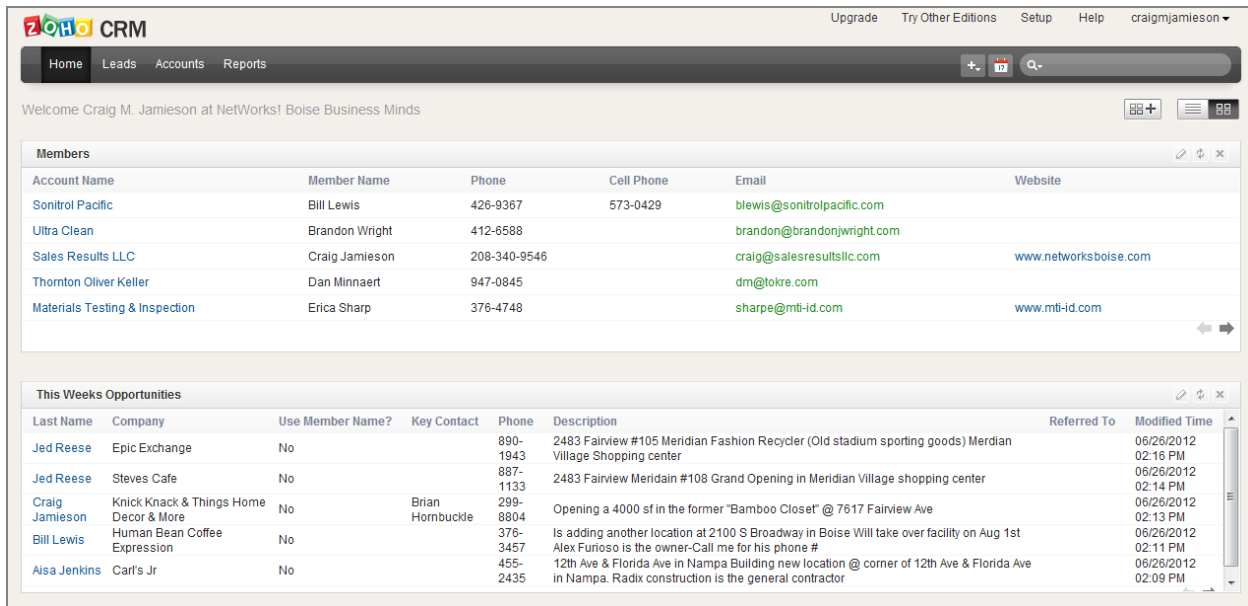
### Member Profiles

Member profiles are located on our main page.

### Interested in learning more about social media, social networking, or how to be more successful at either?

I have written extensively on these topics and others. There is an area on the right side bar where you can opt-in to get new articles automatically delivered to you via email.

### Zoho CRM



The screenshot shows the Zoho CRM interface. At the top, there is a navigation bar with 'Home', 'Leads', 'Accounts', and 'Reports'. Below this, a welcome message reads 'Welcome Craig M. Jamieson at NetWorks! Boise Business Minds'. The main content area is divided into two sections: 'Members' and 'This Weeks Opportunities'.

Account Name	Member Name	Phone	Cell Phone	Email	Website
Sonitrol Pacific	Bill Lewis	426-9367	573-0429	blewis@sonitrolpacific.com	
Ultra Clean	Brandon Wright	412-6588		brandon@brandonwright.com	
Sales Results LLC	Craig Jamieson	208-340-9546		craig@salesresultsllc.com	www.networksboise.com
Thornton Oliver Keller	Dan Minnaert	947-0845		dm@tokre.com	
Materials Testing & Inspection	Erica Sharp	376-4748		sharp@mti-id.com	www.mti-id.com

Last Name	Company	Use Member Name?	Key Contact	Phone	Description	Referred To	Modified Time
Jed Reese	Epic Exchange	No		890-1943	2483 Fairview #105 Meridian Fashion Recycler (Old stadium sporting goods) Meridian Village Shopping center		06/26/2012 02:16 PM
Jed Reese	Steves Cafe	No		887-1133	2483 Fairview Meridian #108 Grand Opening in Meridian Village shopping center		06/26/2012 02:14 PM
Craig Jamieson	Knick Knack & Things Home Decor & More	No	Brian Hornbuckle	299-8804	Opening a 4000 sf in the former "Bamboo Closet" @ 7617 Fairview Ave		06/26/2012 02:13 PM
Bill Lewis	Human Bean Coffee Expression	No		376-3457	Is adding another location at 2100 S Broadway in Boise Will take over facility on Aug 1st Alex Furioso is the owner-Call me for his phone #		06/26/2012 02:11 PM
Aisa Jenkins	Carl's Jr	No		455-2435	12th Ave & Florida Ave in Nampa Building new location @ corner of 12th Ave & Florida Ave in Nampa. Radix construction is the general contractor		06/26/2012 02:09 PM

We have chosen to use a product called Zoho to store and track our shared leads. As a new member, you are walking into a complete database of EVERY shared lead from your group since the beginning of that group. The login for the account is shared by all members of your group so, if you should start playing around (please speak to me before doing so), your changes will be seen by all members of your group.

With this system, all leads become *dynamic* Lead info can be updated, edited, or appended by any member. Our system is tied to the date and time that a record is last modified so whenever a modification takes place, that record is thrown back up to the “top of the pile”. Records may be sorted by a variety of parameters including “date last modified”.

**Go to site:** Go to our main site at [www.networksboise.com](http://www.networksboise.com) . On any page at the top (below the NetWorks! header) is the black menu bar. Click on the "Resources" tab and you will find a link to the CRM on that page. Click on that option. If you do not have the username and password, please reach out to me.

Please note a couple of things. You call up all leads lists simply by clicking the orange tab up top marked “Leads”. In the upper left side of this image, please note that the view is listed as “**Leads Listing**”. This is a custom view I created to show you what you likely most want to see. If it is not the default view, it is selected from the drop down menu. You can also then click on any column header, say “Company” for example, to sort that column alphabetically. In case you are wondering, the “Last Name” field is a required field and I am using that to provide a short description of the lead. You can click on that field, shown in blue, to go to that lead’s full record.

The same type of list can be generated in the “Reports” section. As shown below, select “Reports” from the orange tab and then select “**Lead Recap**”. The difference here is that, if you wish, you can generate a pdf of the report for your use later and off line. We can also customize and filter reports. For example, show me only leads that have been either created or updated within “X” time period.

You can also search records on a variety of criteria. Go to “Leads” and then select your search criteria from the drop down box and enter all or part of the name that you are searching for.

There are also a “How-To” video on the CRM on the “Resources” page that can be accessed from a drop down menu below the “Resources” tab on the main menu bar on the website. Please note that some screens have changed as the software packages have been updated.

You can also call me at any time with questions or to arrange a time when I can walk you through these. This can be done on-line with you at your computer watching me on my computer.

## Testimonials

"I have been a member of the leads group that meets on Wednesday's at noon for about three months. I have been extremely pleased with the number and quality of leads that are given each and every week. We have a very diverse and dedicated membership that allows for a dynamic snapshot of upcoming business opportunities in the Treasure Valley. The meetings start and conclude on time, lasting one hour. It's an hour packed with very useful information, whether it's a member or guest giving a presentation or training on the online leads management program. I find it to be one of the best hours I spend on lead generation during my workweek."

***Virginia Cunningham, Account Executive – Golden West Signs, Inc.***

"Craig, I have to say that being in the group is a tremendous asset to our marketing program. Not only are there good leads but, everyone is serious about helping others. I have attended my fair share of leads groups and the leads are weak and people feel that doing business with each other is the lead for the week. To me, that's not what a group should be about. Keep up the good work and let me know what areas of members you need filled and I will give you the best candidates that I know."

***Brandon Wright, President - Ultra Clean Companies***

"I've worked with Craig over the past couple of years with his B2B company Networks!, and can say that he's brought more results back to me than I have for him. I've never been associated with any leads group more dedicated to helping its members succeed than I have this one. Craig's tireless efforts on educating and informing his membership with both tested avenues as well as encouraging us to venture into new arenas liked LinkedIn have been remarkable. I'd recommend Craig to anyone looking to grow their business and network. You're the best, thanks Craig!" July 3, 2009

***Clint Paskewitz, Producer - Associated Insurance Products***

"Craig Jamieson is an outstanding individual which I feel very fortunate to have known. Without Craig's efforts, knowledge and determination, I can honestly say that I would not as successful as I am today. The quality of professional people which Craig has brought together through Networks!, has made the challenging economic environment sustainable and profitable. Craig's passion and commitment towards the Networks! Group has more than exceeded my expectations. His wealth of knowledge and experience has been an excellent resource. Thank you Craig and I look forward to another great year! Dan Cannon Business Interiors of Idaho" July 6, 2009

***Dan Cannon, Sales, Design and Management - Business Interiors of Idaho***

Find more recommendations by visiting [Craig's profile on LinkedIn](#)

## **Appendix**

**NetWorks! Boise Valley Membership Application**

**Checks payable to: Sales Results LLC – 10331 Summerwind Drive. Boise ID 83704  
Craig M. Jamieson – 208.340.9546 – craig@adaptive-business.com**

Applicant Name: \_\_\_\_\_ Title: \_\_\_\_\_

Applicant Company: \_\_\_\_\_ Years employed by this company: \_\_\_\_\_

Industry/ Products or Services: \_\_\_\_\_

Company Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

Years Company Has Been in Business: \_\_\_\_\_ Number of Employees: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Email Address:  
\_\_\_\_\_

Please describe your responsibilities and target market:

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Please give us a brief overview of your last 10 years employment history:

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Please describe how you feel you will best contribute to the group:

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Should I be extended an offer of membership, as conditions for continued membership, I agree to the following and also recognize that failure to adhere to these conditions will result in my being asked to resign my membership in the group:

1. I (or my designated alternate) will attend a minimum of 75% of all group meetings.
2. I will arrive at meetings on time. Habitual lateness will result in my being asked to resign.
3. I will provide at least 2 quality leads, updates, or referrals at each meeting with a completed group “leads form”.
4. I will use my best efforts to maximizing results for all members of the group.
5. I will respect member and lead source anonymity as the standard, not the exception, regarding any information obtained as a result of being a member of the group.
6. Members will not actively solicit business from other members without an express invitation from that member. We do encourage members to allow other members the opportunity to earn their business much as any other company would need to do.
7. I will never share information received as a result of this group with any other leads organization or individual.
8. I will not allow any other individuals access to the group’s CRM database.
9. Failure of either me or my company in conducting itself in a professional manner will result in termination of my membership. I agree to represent only **one company** and **only one industry classification** at the group and understand that a change in employment may result in a termination of my membership. First right of membership will typically fall to the party paying for dues if there is a conflict.
10. Dues are payable prior to the beginning of a new quarter. Failure to remit on time, without prior authorization, will result in my immediate termination from the group. Current dues are \$1,392 annually for Networks! Boise and are payable in advance on a quarterly schedule.
11. If membership is terminated by either party, the member will be entitled to a refund of unused dues for the remaining whole months only that they have paid in advance.

## NetWorks! Boise Valley Fact Sheet

**NetWorks! Boise Valley** is a privately held company that is owned and operated by Craig M. Jamieson as a part of Sales Results LLC. It currently has one B2B networking group that meets weekly 12 times per quarter. Unlike member-run groups of this nature, all group operations are borne by the owner vs. being shared as rotating responsibilities of the group members.

**Who is NetWorks! best designed for?** First of all, our groups are heavily slanted toward companies that are B2B vs. B2C. The person who will benefit most from participation in our groups will be an individual who is expected to generate new revenues for their company and who's compensation is at least partially based on revenue generation.

### Your dues include:

- The weekly meal.
- Access to your groups' web based CRM where shared leads are uploaded weekly. A report is also generated and sent to all group members.
- Featured spots on our website for you and your company.
- The opportunity to contribute articles to our public blog.
- We regular share information on our members and their companies (with their approval) on the three major social networks (Twitter, FaceBook, and LinkedIn).

**Are dues tax deductible?** We would say yes but, please confirm with your accountant. The actual cost of membership is quite low. Please consider:

- Approximately ½ of your dues are dedicated to the meal which, if you eat out once per week, you are already paying for that. The difference is that with NetWorks! it is like taking 10-20 of your best clients out to lunch or breakfast each week and they all pay their own way.
- Next take your dues and reduce those by your tax savings. **Membership in NetWorks!, for most, is really less than \$12/week or under \$144 per quarter.** For those who work on commission, that is probably \$1,000 in new sales directly tied to the group each quarter to cover that amount. Peanuts!

**What can I expect?** Networking is what you make of it and it does require work. You can expect ...

- To make some very profitable connections with other professionals.
- To receive 10-40 good leads weekly that you can follow-up on if they are applicable to you.
- Direct referrals and introductions from other members as you **earn that right.**

## Our 90-Day Money-Back Guarantee \*

We are so convinced that NetWorks! Boise Valley will exceed your expectations that we are happy to extend this money-back guarantee to all new members who complete their first quarter with us. There are conditions and these conditions are in place to ensure your success.

1. **You** must attend (you personally, not an alternate) a minimum of 9 out of the 12 meetings in the quarter and you must fully complete the 90 day quarter. You also agree to do a presentation to your group sometime during the first 6 weeks of membership.
2. You must contribute a minimum of two written leads per week including those weeks that you may be unable to attend.
3. You agree to meet with 6 members off-site to get to know each other better during this 90-day period.
4. You agree to provide the group operator with a full-profile on you suitable for our website within 10 days of start date.
5. You agree to spend one hour with Craig on-line reviewing our tools and resources within 10 days of start date.
6. You have met any and all of the other requirements for membership as are found on your membership agreement.

\*Having met all of the above terms and conditions, at the end of your first 90 days of membership, if you do not feel that we have more than provided you with adequate value for your dues, just say "I would like my money back please" and we will write you a check to you or your company (whoever paid the dues) for the full dues amount paid and terminate your membership with our thanks! This request must be made in writing within 5 working days from the last meeting of your first 90 day quarter. While an explanation would be appreciated, it is not required. Partial refunds will not be given for any reason as a part of this money-back guarantee.



Member Name: \_\_\_\_\_ Group: \_\_\_\_\_ Date: \_\_\_\_\_

**Share A Success Story!**

\*\*\*\*\*

Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Phone2: \_\_\_\_\_ Email: \_\_\_\_\_

Web: \_\_\_\_\_ Alternate Contacts: \_\_\_\_\_ Referral for: \_\_\_\_\_

Use name? Yes or No Current Address: \_\_\_\_\_ New Address: \_\_\_\_\_

What can you tell us about the nature of this lead? :  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*\*\*\*\*

Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Phone2: \_\_\_\_\_ Email: \_\_\_\_\_

Web: \_\_\_\_\_ Alternate Contacts: \_\_\_\_\_ Referral for: \_\_\_\_\_

Use name? Yes or No Current Address: \_\_\_\_\_ New Address: \_\_\_\_\_

What can you tell us about the nature of this lead? :  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Phone2: \_\_\_\_\_ Email: \_\_\_\_\_

Web: \_\_\_\_\_ Alternate Contacts: \_\_\_\_\_ Referral for: \_\_\_\_\_

Use name? Yes or No Current Address: \_\_\_\_\_ New Address: \_\_\_\_\_

What can you tell us about the nature of this lead? :  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_