



Prospecting Business Centers of Influence Worksheet

Who Are Your Centers of Influence (COI)?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____



What Do Centers of Influence (COI) Want from a Bank or Credit Union Professional Seeking Their Business?

What do your clients/members/prospects really want from their Business Banker?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____



Identify Your Client/Member

Let's narrow down who your target clients/members are according to a few questions you can ask yourself.

1. What has been your (you as the business banker) most recent success?

2. Look at your most successful client(s)/member(s). What do these clients/members have in common? What are their characteristics?

- Geographic location
- Type of customers they service
- Type of business
- Small business owner or corporation
- Asset size
- One location or multiple locations
- Number of employees



