



How to Identify Your Center of Influence (COI)

What is a COI?

Unlike a prospective client, COI's are other professionals who target the same ideal client as you but don't compete with what you do. Their type of business supports the same clients you support.

Examples of COI's per profession:

Prospective client: Homeowner looking to buy or sell

COI's: Realtors, mortgage brokers who get their own leads, insurance agents, divorce or estate attorneys, finance advisors

Prospective Client: Medium to Large sized company with 100-1000 employees

COI's: Payroll, HR services, business bankers, 401K specialists, Employee benefits specialist, IT companies

When identifying your own COI's, keep in mind that it should be a win-win! You shouldn't just identify professionals who can send YOU referrals but also who you can SEND referrals to as well.

List your ideal client or target market:

Who else is targeting that client? What other problems does that client have and who can help them solve it?

List 3 to 5 COI's for your ideal client:

1. _____
2. _____
3. _____
4. _____
5. _____