

Practice Development Series

Module 3: Prospecting / Activity 7 – Centres of Influence

Aligned with the PFA™ Designation Program

Instructions: A critical part of your business plan is developing your Centre of Influence (COI) network. To do so, input a minimum of 3-5 potential COIs in the template that follows. Be sure to include comments on their influence and/or their area of expertise. Make note of the services they provide that are complimentary to your business, as well as a schedule of how frequently you plan to be in touch with them.

Business Plan – Centres of Influence			
Name and Contact Details	Area of Expertise and/or Influence	Services Provided	Frequency of Contact

