

# INSTREAM

INTEGRATING UPSTREAM AND DOWNSTREAM  
TO EXPONENTIALLY GROW YOUR BUSINESS

Partner Name: \_\_\_\_\_

Potential Lifetime Value of Relationship:

\_\_\_\_\_

Partner's products, services, and experiences:

\_\_\_\_\_

\_\_\_\_\_

Product and Service URL's

\_\_\_\_\_

URL's for Tracking and Research

 Facebook:

 Twitter:

 Instagram:

Other:

Upstream or Downstream: Based on...

\_\_\_\_\_

Ideal Partnerships:

\_\_\_\_\_

## **Their Partners Core Support Team.**



- JV Manager/broker:
- Personal Assistant:
- Office Manager:
- Launch Managers:
- Event manager/organizer:

Hobbies:

---

---

Charities/Causes:

---

---

Groups or Masterminds that they are in or run?

---

---

---

Additional info:

---

---

---

## The Strategy:



### Step One: Rate the Relationship

- 0.They do not know who you are
- 1.They know who you are...but it does not matter to them
- 2.They know who you are and have a perception/judgment of what you do/who you are
- 3.You have had a conversation/interaction that you both remember...this could include an endorsed introduction from a mutual friend
- 4.Relationship - You have "Gone first in a couple of meaningful ways"
- 5.You have their phone number in your phone
- 6.You are present to special events (bdays, special events, book launches, family events)
- 7.Intimacy - You have their phone number in your phone and your texts and calls are welcome
- 8.Consciously looking for ways to support and collaborate together
- 9.Have made money together and WANT TO DO IT AGAIN!!
- 10.Influence - They take action because YOU ask them to

### Step 2: How specifically will I get to Intimacy and influence...

Short Term \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Mid Term \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Long Term \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_