## Template for Tracking Results

Documenting the results you and your COI partners achieve as a result of your partnerships is critical for several reasons:

* It helps you know whether your partners are following through on their end of your agreements.
* It allows you to compare actual results against your partners’ potential to refer new business.
* When you know how much value you are providing to your partners in terms of increased revenue, you can ask for more referrals in return.

The basic template below can be used to track your results. You may wish to track additional details and/or adapt it to Excel or another format convenient to you and your partners. Be sure to update it during each of your monthly meetings.

**Results: Your Partner**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of client or prospective client sent content** | **Content delivered** (For example, title of report) | **Date content delivered** | **Type of result** (For example, additional business, new client) | **Approximate additional revenue** |
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**Results: You**

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| --- | --- | --- | --- | --- |
| **Name of prospective client referred by partner** | **Date referral received** | **Prospective client converted** (Yes/No) | **Assets under management** | **Approximate additional revenue** |
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