Warm Introduction Checklist

A practical checklist for asking for, making, and following up on a warm introduction (one made by someone you both know). Use it before you involve someone else's reputation, and again after the introduction is made.

01 Get clear first

- ☐ Write down who you want to meet, in a specific role, not a vague category.
- ☐ In one sentence, say why the conversation would be useful to them, not only to you.
- ☐ Confirm this is a conversation you are ready to have now, with a clear ask if the door opens.
- ☐ Decide what a good outcome looks like: a meeting, a second introduction, or a no that you can accept.

02 Find a real path

- ☐ Name the person who might introduce you, and why the connection is real.
- ☐ Check that you are not asking a stranger to use their reputation on your behalf.
- ☐ Note any shared event, prior conversation, or work in common you can point to honestly.
- ☐ If there is no warm path, pause the name and use a direct, respectful approach instead.

03 Make it easy to help

- ☐ Write a short note the introducer can paste and forward with no edits.
- ☐ Keep the note to who you are, what you are asking, and why it might be relevant.
- ☐ Do not attach a long deck unless the introducer asks for one.
- ☐ Offer a clean way to say no: it is perfectly fine if now is not the right time.
- ☐ Ask once. Do not follow a maybe with a stack of reminders.

04 After the intro

- ☐ Reply quickly, on the same thread, and thank the introducer in view of everyone.
- ☐ Propose a simple next step and a few times that work.
- ☐ Update the introducer once the meeting is set, and again after it happens.
- ☐ Close the loop even if the answer is no. Leave the relationship better than you found it.

> **A note on tone.** A warm introduction is a favor. Write like someone who is asking to borrow a reputation, not like someone who is owed a meeting.

Intro request worksheet

Fill this in before you send the ask. If you cannot complete a line honestly, you are not ready to involve an introducer.

The person you want to meet

Name / role _____

Why them, why now _____

Useful to them because _____

The introducer

Name / how you know them _____

Why they are a fair person to ask _____

Short note (ready to paste and forward)

After it lands

Date the intro was made _____

Next step agreed _____

Thank-you sent to introducer _____

Outcome, in one line _____

This is a working tool for your own outreach. It is not a guarantee that an introduction will be made or that a meeting will follow.