Klarstig

Sales Nonprofit Employee Referral

Introduce a person or organization to an appropriate service or contact. Explain the reason for the introduction and confirm permission to share the details.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Person or organization being referred *

Receiving service or contact *

Reason for referral *

Relevant needs and expected support *

Permission to share the stated information *

- ☐ Permission confirmed
- ☐ Permission still needed
- ☐ No personal details are being shared

Permitted contact details for the referred party

Timing or availability constraints

Specific details

Team or work area when relevant

Complete when relevant to this request.

Workplace process or interaction relevant to your response

Operating context

Mission program or community served

Complete when relevant to this request.

Participation funding restrictions volunteer needs and reporting context

Team specific details

Account opportunity or sales owner

Complete when relevant to this request.

Customer needs buying stage commitments and next agreed contact

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

Klarstig / Daniel Petry · klarstig.ai · hello@klarstig.ai · support@klarstig.ai · 800-781-1775 · 11917 Laurel Ave., Forestville, CA 95436, USA