



Member Success Program
Workbook

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Welcome

Dear BNI Member,

Welcome to BNI's Member Success Program (MSP)!

Effective networking is not an inherited skill, it is a learned experience. In keeping with BNI's mission of *helping Members increase their business through a structured, positive, and professional referral marketing program that enables them to develop long-term, meaningful relationships with quality business professionals*, MSP introduce you to the practices that have proven successful to hundreds of thousands of businesses over decades.

This 8-module program is intended to better acclimate you to BNI and teach how to build profitable relationships to help achieve your and your chapter's collective goals. MSP was carefully designed to allow you to learn at your own pace and employs a variety of modalities. Additionally, we have provided several tools and resources to assist you on your journey.

We encourage you as a new BNI Lifelong Learner to take advantage of the additional learning opportunities provided by BNI to make the most of your membership!

Sincerely,
BNI's Global Learning & Development Team



ABOUT BNI

BNI exists to help BNI Members enjoy a terrific business and a fulfilling life. We do that through a proven business development program that leads to long-term, profitable relationships with other purpose-driven business professionals.



GIVERS GAIN®

Be willing to give first, before you expect to gain. Giving unconditionally creates a better world for everyone and creates important opportunities and lasting relationships.



BUILDING RELATIONSHIPS

Building strong relationships creates an environment of trust and support that yields happiness, opportunity and meaning.



LIFELONG LEARNING

Invest in yourself to become the leader you want to be. Your value grows as you develop your knowledge and skills. Lifelong Learning and lifelong happiness are intimately connected.



TRADITIONS + INNOVATION

We honor our traditions and look to a brighter future fueled by innovation, optimism and excitement.



POSITIVE ATTITUDE

We find the good in everything that happens to us and that propels our lives forward. Finding the good in every person enables us to attract terrific people, opportunities and wealth.



ACCOUNTABILITY

We keep the promises we make, especially when it is hard to do so. This creates trust and supports strong relationships.



RECOGNITION

We appreciate that recognition fuels the growth of successful organizations. The person who masters the art of recognition attracts success, meaning and happiness.

BNI CODE OF ETHICS

- 1 I will provide the **quality of services** at the prices that I have quoted.
- 2 I will be **truthful** with the Members and their referrals.
- 3 I will **build goodwill and trust** among Members and their referrals.
- 4 I will **take responsibility** for following up on the referrals I receive.
- 5 I will display a **positive and supportive** attitude.
- 6 I will live up to the **ethical** standards of my profession.*

*Professional standards outlined in a formal code of conduct for any profession supersede the above standards. This means that a Member belonging to a profession that has a more stringent standard must adhere to that higher standard.



Member Success Program

Lesson 2

Growing Your BNI Referral Network



7-MINUTE GUIDE TO GROWING YOUR REFERRAL NETWORK

You increase the number of referrals you generate for your business each time your network grows. BNI® Members receive training on how to deliver referrals that turn into business. Referral customers spend more with you and remain loyal longer than other marketing methods.

The larger your BNI Chapter, the more people within your network who are trained and dedicated to deliver referrals to you. Growing your Chapter is an opportunity for every Member to grow.

YOU WILL CLOSE MORE BUSINESS AS YOU GROW YOUR NETWORK

3 SIMPLE STEPS TO SPONSORING NEW CHAPTER MEMBERS TO GROW YOUR NETWORK

STEP 1 IDENTIFY

1

Take an inventory of your current network. What are your incomplete categories? Each one brings you valuable contacts. Make a list of individuals you'd love to have in your network. If you know them, invite them to be your visitor at a Chapter meeting. If you don't know them, ask who within your Chapter is the best person to invite them to grow your network.

STEP 2 INVITE

2

The key is to invite your prospective visitor to a meeting. Your Visitor must come, see a meeting, and learn how BNI works before they can commit to joining your network. Once your Visitor attends, they are in a better position to judge the value and commitment of joining the chapter. Make sure you call or text your guest the night before as a reminder and confirmation to demonstrate their attendance is important to you.

STEP 3 GROW

3

Make your Visitor feel welcomed with they arrive. Introduce them to other Members of your Chapter. With each introduction, tell both parties how they could be a beneficial contact. After the meeting, ask your visitor, "How do you feel about joining a group of people that are going to pass you business?"

INVITE USING AN INTRIGUING AND COMPLEMENTARY APPROACH

To help make invitations as simple as possible, here's a sample script you can use:



Hi Bob,

I am pulling together an exclusive network of successful businesspeople who believe in helping each other grow their businesses. We are looking for a reliable person who is an expert in [prospect professional classification] to add to our network. I immediately thought of you. Are you available on [date for next Chapter meeting] to visit with us?

IDENTIFY THE KEY GAPS IN YOUR REFERRAL NETWORK



The strongest networks have Members across many different categories.

Here are common professional classifications for BNI Members. **Check the box** next to each category that's already represented by a Member of your Chapter:

CONTACT SPHERE						
	EVENTS	MARKETING SERVICES	BUSINESS SERVICES	REAL ESTATE	TRADES	HEALTH & BEAUTY
CORE CATEGORIES	<input type="checkbox"/> Photographer	<input type="checkbox"/> Digital Marketing	<input type="checkbox"/> Financial Advisor	<input type="checkbox"/> Residential Agent	<input type="checkbox"/> Builder	<input type="checkbox"/> Chiropractor
	<input type="checkbox"/> Travel Agent	<input type="checkbox"/> Graphic Designer	<input type="checkbox"/> Accounting Svcs.	<input type="checkbox"/> Mortgages	<input type="checkbox"/> HVAC	<input type="checkbox"/> Massage Therapist
	<input type="checkbox"/> Caterer	<input type="checkbox"/> Marketing Services	<input type="checkbox"/> Banking Services	<input type="checkbox"/> P&C Insurance	<input type="checkbox"/> Painter	<input type="checkbox"/> General Dentist
	<input type="checkbox"/> Event Planner	<input type="checkbox"/> Promotional Items	<input type="checkbox"/> IT Services	<input type="checkbox"/> Cleaning Service	<input type="checkbox"/> Electrician	<input type="checkbox"/> Supplements
CORE SUB CATEGORIES	<input type="checkbox"/> Gifts	<input type="checkbox"/> Printer	<input type="checkbox"/> Commercial Ins	<input type="checkbox"/> Security Systems	<input type="checkbox"/> Plumbing	<input type="checkbox"/> Alt Wellness
	<input type="checkbox"/> Florist	<input type="checkbox"/> Sign Company	<input type="checkbox"/> Business Law	<input type="checkbox"/> Real Estate Law	<input type="checkbox"/> Interior Decorator	<input type="checkbox"/> Cosmetic/Skincare
	<input type="checkbox"/> Event Venue	<input type="checkbox"/> Media Services	<input type="checkbox"/> Telecom	<input type="checkbox"/> Title Services	<input type="checkbox"/> Landscape Svcs	<input type="checkbox"/> Fine Jewelry
	<input type="checkbox"/> Baker	<input type="checkbox"/> Print Advertising	<input type="checkbox"/> Health Insurance	<input type="checkbox"/> Inspector	<input type="checkbox"/> Flooring	<input type="checkbox"/> Supplemental Ins.
ADDITIONAL CATEGORIES	<input type="checkbox"/> Wine Merchant	<input type="checkbox"/> Copywriter	<input type="checkbox"/> Credit Card	<input type="checkbox"/> Property Mgmt	<input type="checkbox"/> Roofing & Gutters	<input type="checkbox"/> Clothing/Accessory
	<input type="checkbox"/> Event Marketer	<input type="checkbox"/> Videographer	<input type="checkbox"/> Business Advisor	<input type="checkbox"/> Pest Control	<input type="checkbox"/> Renovations	<input type="checkbox"/> Personal Trainer
	<input type="checkbox"/> DJ/Musician	<input type="checkbox"/> Radio Advertising	<input type="checkbox"/> Office Machines	<input type="checkbox"/> Carpet Cleaning	<input type="checkbox"/> Building Materials	<input type="checkbox"/> Eye Care
	<input type="checkbox"/> Hotel/ Restaurant	<input type="checkbox"/> Embroidery	<input type="checkbox"/> Employment	<input type="checkbox"/> Moving Company	<input type="checkbox"/> Windows/Doors	<input type="checkbox"/> Acupuncture

The classifications without check marks are the open positions within your BNI Chapter and your referral network. For each of these, who do you know who you'd like to add to become an official member of your referral network by inviting them to join your BNI Chapter? **Pay special attention to any spheres with fewer than four classifications, these are the most urgent opportunities to grow your network.**

FOR FURTHER STUDY:

VIDEO

- ✓ Member Success Program – **Cultivating Visitors**®
- ✓ Power Team Training – **Identifying Industry Leaders**®
- ✓ Power Team – **Identify Professional Classifications**®

BOOK

Networking Like a Pro® by Ivan Misner, Ph.D.

PODCAST

- ✓ **Episode 541:** Inviting Visitors (Classic Podcast)®
- ✓ **Episode 350:** Invite a Visitor (Get Connected–Stay Connected 7)®
- ✓ **Episode 411:** Using Power Teams to Attract Visitors®
- ✓ **Episode 138:**



Eight in Six

The most successful members are typically in the most balanced chapters. Did you know that if we could build chapters with eight members in each of the six Contact Spheres, chapters would be 48 thriving members? Your Contact Sphere provides 50-60% of your referrals.

Contact Sphere Key Categories Supporting Categories Additional Categories	Events Photographer <hr/> Travel Agent <hr/> Caterer <hr/> Event Planner	Marketing Services Digital Marketing <hr/> Graphic Designer <hr/> Mktg Consultant <hr/> Promotional Prod	Business Services Financial Advisor <hr/> Accounting Svs <hr/> Banking Services <hr/> IT Services	Real Estate Residential Agent <hr/> Mortgages <hr/> P & C Insurance <hr/> Cleaning Service	Trades Builder/GC <hr/> HVAC <hr/> Painter <hr/> Electrician	Health & Wellness Chiropractor <hr/> Massage Therapist <hr/> General Dentist <hr/> Supplements
	Gifts <hr/> Florist <hr/> Event Venue <hr/> Baker	Printer <hr/> Sign Company <hr/> Media Services <hr/> Print Advertising	Commercial Ins <hr/> Business Law <hr/> Telecom <hr/> Health Insurance	Security Systems <hr/> Real Estate Law <hr/> Title Services <hr/> Inspector	Plumbing <hr/> Interior Decorator <hr/> Landscape Svcs <hr/> Flooring	Alt Wellness <hr/> Cosmetic/Skin care <hr/> Fine Jewelry <hr/> Supplemental Ins
	Wine Merchant <hr/> Event Manager <hr/> DJ <hr/> Hotel	Copywriter/Writer <hr/> Videographer <hr/> Radio Advertising <hr/> Embroidery	Credit Card <hr/> Business Consultg <hr/> Office Machines <hr/> Employment	Property Mngment <hr/> Pest Control <hr/> Carpet Cleaning <hr/> Moving Company	Roofing & Gutters <hr/> Renovations <hr/> Building Materials <hr/> Windows/Doors	Clothing/Accessory <hr/> Personal Trainer <hr/> Eye Care <hr/> Acupuncture



Member Success Program

Lesson 3

Maximizing Referrals Through Visibility

7-Minute Guide to

MAXIMUM REFERRALS THROUGH VISIBILITY



You never receive referrals from someone who doesn't know, like and trust you. Becoming known, growing relationships, and becoming trusted always begins with being visible. You've got to show up before you can stand out.

Your BNI® Chapter has made a commitment to you by not accepting another Member from your professional classification.

This enables you to grow your business in an environment free from direct competitors. To maximize the referrals you generate, it's important to be visible at Chapter meetings by attending yourself or ensuring you have someone there to fill in for you.

Visibility helps you grow your referral network and generate referrals that increase your business revenue. When you attend your BNI Chapter meetings you will:

- Engage your network of businesspeople who know how to generate meaningful referrals to you.
- Build relationships and trust with a room full of givers dedicated to helping you grow.
- Spark referrals from Chapter Members by delivering your Weekly Presentation.
- Get important solutions to your business challenges rather than having to figure it out on your own.
- Receive recognition for the referrals you generate, building your reputation with your Chapter's Members.

BNI® CHAPTERS THAT HAVE THE FEWEST ABSENCES CLOSE THE MOST BUSINESS

Having an attendance policy ensures you know what to expect from your Chapter Members in exchange for the Chapter's commitment to accept only one Member from each professional classification.

When you send a substitute it's not counted as an absence because you have something there to represent your business.



3-SIMPLE STEPS TO MAXIMIZING YOUR REFERRALS THROUGH VISIBILITY

1 ATTEND
Block the time for your BNI Meeting in your schedule, encourage your family and colleagues to support your referral generation time to enable you to reach and exceed your business growth goals.

2 FIND SUBSTITUTES
When you can't make a meeting, have someone prepared who can attend the meeting on your behalf. Substitutes enjoy the opportunity to attend be a part of a Chapter meeting for a day.

3 BE ACCOUNTABLE
The only way to build trust is to make promises and keep them. Rather than expect others to believe and accept your word, demonstrate who you are by following through on your promises, even when it appears no one is looking.

WHILE NO ONE CAN TAKE YOUR PLACE,
A SUBSTITUTE MAY FILL IN FOR
YOU WHEN YOU CAN'T ATTEND



Substitutes often generate business when attending for BNI Members. Plus, it gives Chapter Members another person to refer to and build a relationship with.

If you must miss a meeting, sending a substitute is a great alternative.

MAKE A LIST OF PEOPLE WHO KNOW HOW GOOD YOU ARE AT PROVIDING PRODUCTS OR SERVICES:

- Other local businesspeople
- Clients and suppliers
- Your staff and sales representatives
- Industry colleagues
- Now add in others you could call on with less notice
- Spouse and family members
- Friends and members
- Fellow team members in clubs/sports/volunteering you are involved in

PREPARE YOUR SUBSTITUTE FOR SUCCESS

-  Invite them to a meeting in advance so they feel comfortable with the format of the meeting and know the location.
-  Connect them with a fellow Member to greet them and make introductions.
-  Prepare a Weekly Presentation for them to easily read at the meeting.
-  Give them a list of any referrals you have passed during the week so they can share this with the group.
-  Thank them for representing your business at the meeting.

FOR FURTHER STUDY:

VIDEO

Member Success Program - Weekly Presentation

BOOK

Networking Like a Pro by Ivan Misner, Ph.D.

PODCAST

*Power of One Podcast 59 |
Weekly Presentation Advice*
*Power of One Podcast 4 |
Preparing Your Weekly Presentation*



Good, Better, Best: Substitute Worksheet

Let's face it. Not all substitutes are created equal. Some bring more than others to the table and that is perfectly ok! In this exercise, you'll identify several substitutes and place them in one of three categories – good, better, and best.

Good Substitutes:

Think about family members and close, reliable friends and list their names below.

Better Substitutes:

Consider colleagues with good presentation skills, people you are in clubs with, people you volunteer with or Members of other BNI® Chapters. List their names below.

Best Substitutes:

Your best substitutes include industry colleagues, top clients, suppliers, your staff, your top sales representatives and other local business owners who know the value of a referral. List their names below.





Member Success Program

Lesson 4

Becoming A Great Connector By Giving Referrals

Tracking BNI Activity Entering Slips

Entering “slips” into BNI Connect is how BNI tracks the activity and successes of its Members. Like a business will set and track goals, so does every BNI Chapter. We are working towards standardized global reporting and the first step is to have all Chapter Members use either the BNI Mobile App or the BNI Connect Web version. The following explanations highlight these four activities:

- One-to-One Slips
- Chapter Education Unit Slips
- Referral Slips
- Thank You for Closed Business Slips

All slips can be entered online at www.bniconnect.com. Using your username and password, go to My BNI Business and Submit your respective slips on the lower half of the page. Or you can use the BNI Mobile App, screen shots to follow. By entering your slips electronically, you are now able to track your activity electronically, reduce the paperwork within your Chapter, as well as automatically enter your personal activity on the Chapter PALMS Report, thereby saving your Vice President time!

If you submit paper slips, please complete your slips in advance of your weekly BNI Chapter Meeting. When you enter your slips electronically or bring your completed slips to the meeting, you demonstrate that you are prepared to spend valuable, face-to-face meeting time building relationships with your referral partners. The goal is to avoid the distraction of filling out slips after you arrive. During Open Networking, you should discuss referrals, arrange One-to-Ones, greet visitors and talk about Chapter business. When we follow proper slips protocol, we position ourselves and others to receive the greatest benefit from our structured BNI Chapter Meeting.

One-to-Ones

Purpose

One-to-Ones are key to relationship building and learning how to pass higher quality referrals to your BNI Chapter Members. In essence, it is a referral strategy session.

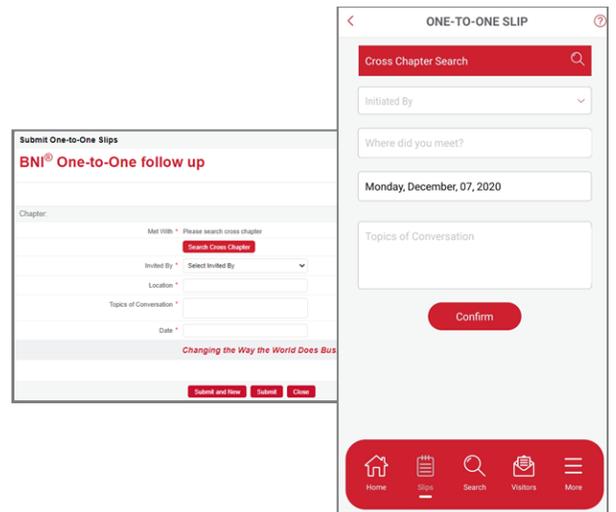
Completion

The Member who initiated the One-to-One:

- Enters the One-to-One electronically

Reporting

- **Electronically:** When a Member enters a One-to-One electronically, both parties receive credit for completing the One-to-One. With electronic reporting, a Member can enter One-to-Ones with Ambassadors, Directors and Members of other BNI Chapters throughout the world! as well as Members within their own Chapter. For detailed instructions, visit [BNI Connect Help](#).
- **Vice Presidents:** When checking and submitting your weekly PALMS report in BNI Connect, the electronically entered slips will automatically appear in your report.



Chapter Education Units (CEUs)

Purpose

Have you ever heard the phrase: “Learn More to Earn More”? There is a direct correlation between the networking education you complete and the revenue you generate from referrals. Submit your Chapter Education Units to report training and education you achieve through BNI sources.

Submit CEU Slips

BNI® Chapter Education Units (CEU)

Member: Jennifer Tolley | Date: 12/07/2020

Course Title	Credits/Course	Qty Earned	Total
1 Hour of BNI Podcasts, Webinars, BNI SuccessNet, etc.	1	0	
1 Hour BNI University or In Person Learning	1	0	
2 Hours BNI University or In Person Learning	2	0	
3 Hours BNI University or In Person Learning	3	0	
4 Hours BNI University or In Person Learning	4	0	
5 Hours BNI University or In Person Learning	5	0	
5 Hours Reading BNI Books, BNI Convention, etc.	5	0	
Total			

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Submit Close

CEU SLIP

1 Hour of BNI Podcasts, Webinars, BNI SuccessNet, etc. 0

Credits/Course: 1 Total: 0

1 Hour of BNI University or In Person Learning 0

Credits/Course: 1 Total: 0

2 Hours of BNI University or In Person Learning 0

Credits/Course: 2 Total: 0

3 Hours of BNI University or In Person Learning 0

Credits/Course: 3 Total: 0

Confirm

Total Credits Earned 0

Home Slips Search Visitors More

Completion

The Member who completes any level of BNI education such as:

- BNI Business Builder Presentations, Training Programs, Podcasts, Webinar recordings
- Keys Skills Workshops
- BNI Books and Podcasts by Dr. Ivan Misner
- Mentor Program, Member Success Program
- Chapter Success Training (Leadership Team Training) and Area/Regional Leadership Roundtables

Each hour you spend on Chapter Education is equal to one credit. 1 hour = 1 credit

For detailed instructions, visit [BNI Connect Help](#).

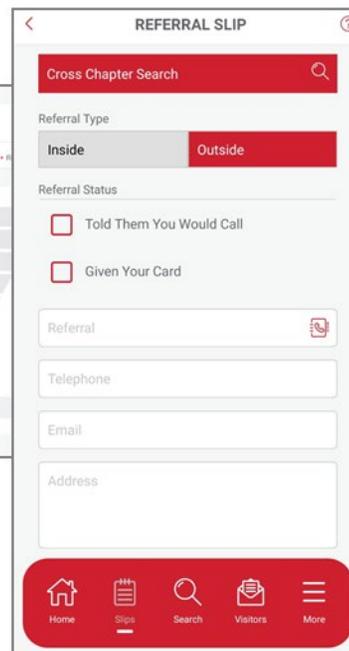
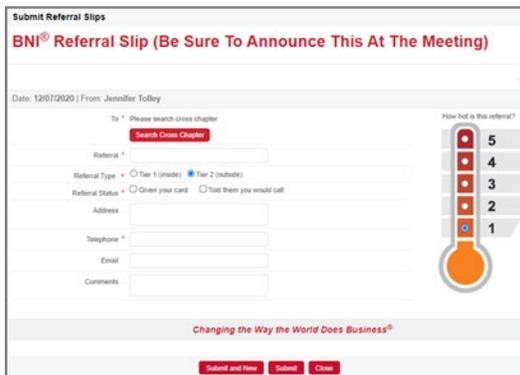
Reporting

- **Electronically:** When a Member enters Chapter Education Units electronically, the data is automatically entered into that week’s PALMS Report. No paper CEU slip is necessary.
- **Vice Presidents:** When checking and submitting your weekly PALMS report in BNI Connect, the electronically entered slips will automatically appear in your report.

Referrals

Purpose

Referral Slips are not the actual referral, rather a mechanism to pass and record the information about the referral. When a potential referral is identified, contact the Member immediately to pass along the information so the referral can be acted upon in a timely manner. The BNI Connect Mobile app is the fastest way to pass a referral!



Completion

The Member who is making the referral connection can:

- Pass a referral to any Member, Director, Ambassador or Global Support Member. For detailed instructions, visit [BNI Connect Help](#).

Be sure to select respective boxes for tracking purposes:

- **Inside:** You are referring yourself (or an immediate family Member in the household) for the first time to use another Member's product or service. One referral slip is given for the first time you use their service.
- **Outside:** You are referring someone outside the Chapter (not an immediate family Member in the household) to use another Member's product or service. One referral slip is given per new client referred.
- **Given Your Card:** Optional.
- **Told Them You Would Call:** Not optional. This is what makes this referral a true referral. When the person you are referring is expecting a call from the Member with anticipation. (To follow generally accepted privacy practices, some professions are prohibited from calling on potential clients; therefore, the person being referred must initiate contact.)

Reporting

- **Electronic:** When a Member enters a Referral electronically, the data is automatically entered into that week's PALMS Report. They will not show up on your activity until the Vice President submits the PALMS report. Additionally, the Member receiving the referral automatically receives an email or push notification indicating the referral information so contact can be made right away. You may choose to print and bring to the BNI Chapter Meeting your Personal Meeting Activity Sheet using the Print Your Weekly Slips link under My BNI Business. For detailed instructions, visit [BNI Connect Help](#).
- **Vice Presidents:** When checking and submitting your weekly PALMS report in BNI Connect, the electronically entered slips will automatically appear in your report. In viewing summary reports, to calculate total number of referrals passed, the Referrals Given Inside and the Referrals Given Outside must be added together. In order to perform the Referral Reality Check, use the Slips Audit Report.

Thank You for Closed Business

Purpose

The Thank You for Closed Business (TYFCB) program is used as a note of appreciation and acknowledgement to the Member who GAVE you a business-generating referral. The program acknowledges Members passing qualified referrals, as well as measuring the value they are providing. It is important that the Member who receives the referral acknowledge the Member who passed them the referral. Report revenue you generate from referrals you receive. When you submit this data, you remain anonymous. Be consistent in your reporting.

Submit TYFCB Slips

BNI® Thank you for closed business

Date: 12/07/2020

Thank you to: Please select from dropdown below or search cross chapter

Select a member from your chapter OR Search Cross Chapter

For a referral in the amount of: Always use local currency

Business Type: New Repeat

Referral Type: Tier 1 (inside) Tier 2 (outside) Tier 3+

Comments:

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Submit and New Submit Close

RECORD TYFCB

Thank you to: [Search]

\$ Amount

Business Type: New Repeat

Referral Type: Inside Outside Tier3+

Comments:

Confirm

Home Slips Search Visitors More

Beyond benefiting the individual who brought you the referral, the Thank You for Closed Business Slips, at full value, demonstrate the value to Members and visitors of your Chapter's referral business. For this same reason, any business that originated with a BNI connection requires a TYFCB Slip forever ... even if the person who referred it is gone.

Completion

The Member who received the referral that turned into closed business can:

- Enter the Thank You for Closed Business online, or using the BNI Mobile App.
- For detailed instructions, visit [BNI Connect Help](#).

Thank You To: The only name referenced in the Thank You for Closed Business Report is that of the person who passed the referral, not the person who received payment; **therefore, this is an anonymous program that credits the Members for the business that they GIVE to others.** When reporting electronically, the person you are acknowledging DOES NOT KNOW that you entered this data. This information is only stored on your BNI Business Page, so YOU know how much revenue was generated from your BNI connections; no one else has access to the revenue that you report.

Thank You for Closed Business may also be submitted for business that comes from other Chapters, visitors or past Members; simply enter the Member who originally invited the past Member or visitor, enter the Visitor's name or enter BNI in the Thank You To line ... that way all business is recorded!

For a referral in the amount of \$: This is not meant to be an exact science for reporting purposes. The goal is to have a consistent reporting system to recognize those Members who pass qualified referrals, while conservatively reporting the amount of business recognized by our Members. For consistency, please see the following pages for reporting guidelines.

Reporting

- **Electronic:** When a Member enters their Thank You for Closed Business electronically, the data is automatically entered into that week's PALMS Report for the Member that is being recognized. The data will not show in your activity until the Vice President submits the PALMS Report that week. You may want to print and bring to the BNI Chapter Meeting your Personal Meeting Activity Sheet using the Print Your Weekly Slips link under My BNI Business; this creates a visual demonstration for the visitors how much completed business is being passed each week.
- **Vice Presidents:** When entering your weekly PALMS data in BNI Connect, the electronic entries will automatically appear in your report; simply add the paper slip value (if any) to the data already entered. In viewing summary reports, this will show each Member's value as a referral giver to the other Members of the Chapter.

Note: The TYFCB reporting is NOT to be used verbally as a replacement for the Referral and Testimonial time during the Chapter Meeting.

What Value Do I Enter as Thank You for Closed Business?

Here is a general explanation of how to track closed business based on what type of business you are in. Not all professions are listed below. Use the suggestions below and common sense when it comes to measuring your profession's results with consistency. Consistency is the key!

Below are examples. Choose the category that best reflects you and your business structure.

Commission-Based Industries

- Enter your gross commission figure.

Examples:

- ✓ Realtors
- ✓ Mortgage lenders

- ✓ Financial Planning
- ✓ Investments

- **Realtor:** A realtor sells a home for \$400,000. Most of that money goes to an owner or a bank. But the full amount that comes to the brokerage is credited to BNI even though the individual realtor may earn less than the full commission. The part that goes to the brokerage firm is one of your expenses of doing business. A realtor would write down the total fee to their *company* on the sale of the house, not just their personal commission. A \$400,000 house with a 7% realtor fee would be entered as \$28,000.

Insurance Fields

- Enter the amount of the premium check. If the car insurance is \$600 per year, the amount entered is \$600. It is recommended that the annual value of the insurance plan is entered, even if they are paying month-to-month. This way a TYFCB slip is submitted only once per year for that client.

Financial Advisors

- Enter amount of the commission fees, whether a fixed rate or percentage of portfolio amount. If the account is \$1,000,000 and the fee is \$1000, the amount entered is \$1000. If you work for an insurance company or an investment firm, the amount the customer is paying is what you credit to your BNI team Member, rather than the amount that actually ends up in your pocket. In other words, you report the amount that your *company* would report as gross income.

Nonprofit Organizations

- Enter the estimated dollar value of donated goods, services, and volunteer time. Report the full amount of monetary donations. If the donations are a recurring amount, you can choose to report monthly or quarterly as long as you are consistent with the reporting.

Service Providers

- Enter the gross amount you charged for your service. A \$1,500 website would be entered as \$1,500. Fields that bill insurance would report the co-pay plus the insurance. Examples:
 - ✓ Website designer
 - ✓ Business coaching
 - ✓ Pool repair/leak detection
 - ✓ Title Service
 - ✓ Photographer
 - ✓ Salon / Spa
 - ✓ Graphic designer
 - ✓ CPA
 - ✓ Entertainer
 - ✓ Pest Control
 - ✓ IT support
 - ✓ Attorney
 - ✓ Medical doctors
 - ✓ Dentists
 - ✓ Naturopaths
 - ✓ Chiropractors
 - ✓ Massage Therapist

Product Providers

- The gross sale of the product plus service costs. A \$500 air filter plus \$100 installation would be reported as \$600. Include any insurance claims if applicable. Examples:
 - ✓ HVAC, Fencing, Shutters, Roofing, Plumbing, Flooring, Cabinets
 - ✓ Landscape design and installation
 - ✓ Custom wood products
 - ✓ General contractor
 - ✓ Alarm systems and monitoring
 - ✓ Promotional products, printing
 - ✓ Online sales (greeting cards, etc.)
 - ✓ Nutritional products
 - ✓ Weight loss products, programs

Banking

- One tricky category is banking. If a banker has a way of tracking how much revenue is coming into the bank, then this would be reported. Otherwise, please follow the definitions below to report closed business for non-commissioned referrals to banks:
 - ✓ Loans: Report the interest that would be generated if the loan would go full term
 - ✓ Deposits: Report 10% of the initial amount to open an account
 - ✓ Lines of Credits (i.e. credit cards, home equity loans, commercial lines of credit, etc.): Report 10% of the line amount

Other

- Not all professions are listed above. Use common sense and the examples above when it comes to measuring a profession's results with consistency. *A short way to remember the complex description above is that with some exceptions, we generally track the total revenue to the individual Member and their respective company represented in BNI.*

What about my privacy?

These numbers are tracked anonymously. You don't enter your name when tracking Thank You for Closed Business. The numbers are ultimately combined with everyone else's numbers.

What if I have more questions?

Talk to your Director about how the Thank You for Closed Business Program can help your Chapter pass even more business.



Member Success Program

Lesson 5

Powerful BNI Weekly Presentations



Weekly Presentation *Planning Document*

Planning, Bragging, Complaining

What would someone be **planning** that would trigger the need for your product or service?

What would someone be **bragging** about that would help your referral partner identify a need for your product or service?

What would be an example of **complaining** that would lead to an introduction for your business?



Section 1 – Products

Take two minutes to brainstorm specific products you provide. If you are a service provider only, skip to section 2.

Section 2 – Services

List out all your specific services. Note: if you are in a business where you only provide products and not services, you can skip this section.



Section 3 – Target Markets

Identify all your target markets.

Section 4 – Problems You Solve

Brainstorm what problems you solve through your business.



Map It Out

Take a moment to identify the topic you will focus on for your next weekly presentation. Using the four steps on your screen, map out your weekly presentation.



Introduce
Yourself



Your
Professional
Classification



A Brief
Story



Referral
Request



Member Success Program
Lesson 6
Impactful One-to-One Meetings



7-MINUTE GUIDE TO PERFECT ONE-TO-ONE MEETINGS

You are going to attend a lot of meetings in your life. Most business owners “wing it” and **waste a lot of time** chatting when they could be building meaningful relationships.



Since 1985, BNI® has been teaching businesspeople how to turn One-to-One meetings into **productive network-building opportunities**.

When following this approach, any One-to-One meeting could lead to an immediate referral; and more importantly, when you follow these steps, they become **a valuable, long-term member** of your referral network.

ONCE YOU’VE MASTERED THESE EASY STEPS, YOU’LL BE ABLE TO:



Build relationships with the right people who can pass you business immediately and for years to come.



Turn strangers into friends who are trained to look for customers who are a good fit for you and motivated to connect you with them.



Get more strong contacts from every networking event you attend because you finally know how to follow up to make yourself stand out and be memorable.



Generate more referrals within BNI and referral marketing outside of it.



Make every business meeting more productive because you have a system to turn strangers into referral partners that know, like, and trust you.

3 SIMPLE STEPS TO BUILDING RELATIONSHIPS THAT TURN INTO A CONSISTENT REFERRAL FLOW

1

INVITE

Your BNI Chapter Members know the value of One-to-One meetings. They already know the GAINS Exchange® process and are excited to get to know you better so they can pass referrals to you. Review your Chapter Member list and schedule three One-to-Ones each month.

CONNECT

Set a time and place for your meeting. Complete the GAINS Exchange worksheet in advance, share your answers before your One-to-One, and ask for the same. This will allow you to make the time together even more powerful.

FOLLOW UP

BNI’s GAINS Exchange process helps you identify opportunities to connect Members of your network. When you make a referral, you build relationships with two members of your referral network.



USE BNI'S GAINS EXCHANGE PROCESS TO TURN ONE-TO-ONES INTO STRONGER MEMBERS OF YOUR NETWORK



GOALS

Ask about the financial, business, educational, and personal objectives they want or need to meet for themselves and for people who are important to them. The best way to develop a relationship is by helping someone achieve something important to them. Consider if there's anyone in your network who could move them closer to achieving any of their goals.



ACCOMPLISHMENTS

Some of your best insight into others comes from knowing what goals they have achieved, what projects they've completed, and who they've worked with in the past. Consider anyone in your network who could benefit by connecting with a person with these accomplishments.



NETWORKS

A network could be an organization, institution, company, civic, religious or professional associations, etc. Ask about the networks they participate in. Consider who you know within your network that would benefit from knowing someone within those networks.



INTERESTS

Your interests - the things you enjoy doing, talking about, listening to or collecting - can help you connect with others. People are more willing to spend time with those you share their interests or know something about them. Ask about their interests and consider others in your network with similar interests.



SKILLS

The more you know about the talents, abilities, and assets of the people in your network, the better equipped you are to find competent, affordable service when you or someone you know needs help.

Our fellow BNI Members will know to reciprocate by asking these questions of you and following up with any referral opportunities they have. While you can make any One-to-One meeting more productive using this process, **you'll always get the best results with your fellow Chapter Members.**

Businesspeople who know how to build personal relationships quickly will **reap the benefits of a consistent long-term referral relationship** and build the most wonderful professional relationships of their lives. One BNI® Member once said, **"BNI® taught me how to have a relationship with my mother."**

Once you learn how to create these relationships for your business, this is a skill you can use for any club, charity, or campaign you lead to be the person who helps to make it into a success.

FOR FURTHER STUDY:



VIDEO

Member Success Program – **Performing One-to-Ones®**
Member Success Program – **Effective One-to-Ones®**



BOOK

World's Best Known Marketing Secret ©
by Dr. Ivan Misner and Mike Macedonio



PODCAST

Episode 191: One-to-Ones Equal More Referrals©



One-to-One Planner

Referral Strategy Sessions

Get to Know Your Team and Increase Your Referrals



Email your worksheets to the person you will meet with next. The worksheets in this manual include the Member Bio Sheet, GAINS Exchange, Contact Sphere Planning Worksheet, and Previous 10 Customers Worksheet.

P R O D U C T I V E | E F F E C T I V E | E F F I C I E N T





Member Biography Sheet

Name:

Date:

Business Information

Business Name:

Profession:

Location:

Years in Business:

Previous types of jobs:

Personal Information

Family Information

A. Spouse / Significant Other

B. Children

C. Animals

Hobbies:

Activities of interest:

City of residence:

How long?

Miscellaneous

My burning desire is to:

Something no one knows about me:

My key to success:



GAINS Worksheet

Use this form to record GAINS for yourself or others with whom you want to build a relationship. Use one form per individual; add sheets as needed. Date each entry to know how old the information is.

NAME: _____ DATE: _____

Goals:

Goals are the financial, business, educational, and personal objectives you want or need to meet for yourself and for people who are important to you. The best way to develop a relationship is by helping someone achieve something that's important to them. If you do, they'll remember you when you need help achieving your goals.

Accomplishments:

Some of your best insight into others comes from knowing what goals they have achieved, what projects they've completed, what they have accomplished both for themselves and for others. Your fellow member's knowledge, skills, experiences, values, and beliefs can be surmised from their achievements.

Interests

Your interests – the things you enjoy doing, talking about, listening to, or collecting – can help you connect with others. People are more willing to spend time with those who share their interests or know something about them.

Networks

How would it benefit you to know what other networks, both formal and informal, that your fellow members are involved with? A network could be an organization, institution, company, civic, religious or professional associations, etc.

Skills

As for Skills, the more you know about the talents, abilities, and assets of the people in your network, the better equipped you are to find competent, affordable service when you or someone you know needs help.



Contact Sphere Planning Worksheet

Contact Spheres are made up of businesses or professions that naturally provide a source of referrals for one another. They are in somewhat related but non-competitive businesses. Businesses in the same Contact Sphere have a symbiotic relationship in that they support and enhance one another.

My Contact Sphere is _____

My Contact Sphere Members

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Contact Sphere Top 3

What other three professions would help you round out your Contact Sphere? Write them down in the space below.

Profession 1:

Profession 2:

Profession 3:

Make a commitment to your One-to-One partner to help fill their Contact Sphere by inviting people to BNI that are in his/her top 3.

Commitment:



Previous 10 Customers Worksheet

Imagine how you can increase the referrals you receive by helping your BNI referral partner understand how to find more customers like the ones listed below!

1. List your previous 10 customers below.
2. Select the ones that are ideal clients or a good referral for you.
3. Write your answers to questions in the spaces provided.

	Customer, Industry or Description	What did you do for them? If an Ideal Client, describe why.	Ideal Client
1			<input type="checkbox"/>
2			<input type="checkbox"/>
3			<input type="checkbox"/>
4			<input type="checkbox"/>
5			<input type="checkbox"/>
6			<input type="checkbox"/>
7			<input type="checkbox"/>
8			<input type="checkbox"/>
9			<input type="checkbox"/>
10			<input type="checkbox"/>



Commit to take action!

The success of the One-to-One Business/Strategy Meeting depends on how well you follow through with the actions you have agreed to take.

FIVE Introductions or Prospects I will work on making for _____:

Name, Company or Industry:	Conversation Starter (What to say):	By When?

Identify one long-term goal/referral that your BNI referral partner can help you achieve: _____

What action steps need to be taken to make this long-term goal/referral a reality?

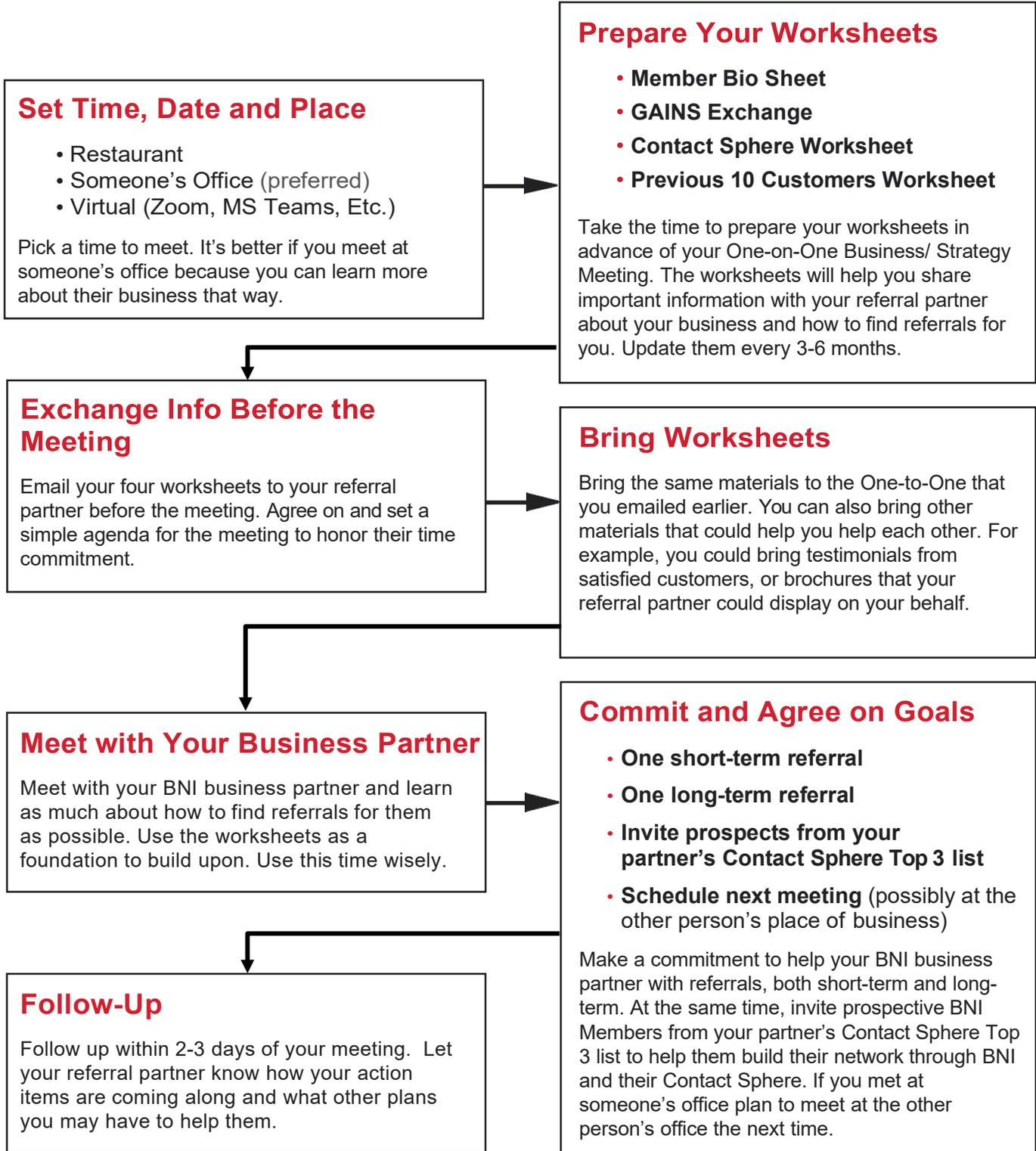
By when? _____

Date of follow up One-to-One Business/Strategy Meeting? _____



Let's review the system!

It's as simple as scheduling one One-to-One, Business/Referral Strategy Session each week with one of your fellow BNI Members.





Member Success Program
Lesson 7
BNI Feature Presentations



Your First Feature Presentation

Planning Document

Why find your “why”?

What “whys” did you hear in each of these stories?

Take a moment and write down a story of your own.





Who is my audience?

What information do I want my audience to know?

How do I want my audience to feel after they hear my “why”/story/purpose?

Am I creating a powerful presentation that will leave a lasting first impression that:

uses a simple presentation structure?

- Does it have a clear beginning, middle and end?

uses creative, visual language throughout the presentation?

- Is it exciting? Does it paint a picture of the story? Does it inspire and immerse your audience?

avoids deep explanation of your business’ technical details?

- Is that technical description needed or can it be simplified and shortened for your audience?

teaches your audience something they did not already know?

- Am I giving them a new perspective on my business and the problems I can solve? If not, how can I make better demonstrate the unique problems I face and their solutions?

has been thoroughly prepared and practiced?

- Did you take time crafting your first Feature Presentation? Have you practiced it in front of a peer and adjusted based on that feedback?



(Your Name)
(Company Name)
(Mailing Address)
(Telephone Number) *(Email Address)*

Your Name: _____

Phone #/Email: _____

Weekly Prospects

Relationship

Contact Info (Name/Tele/email)

- | | | |
|----------|-------|-------|
| 1. _____ | 1 3 5 | _____ |
| 2. _____ | 1 3 5 | _____ |
| 3. _____ | 1 3 5 | _____ |
| 4. _____ | 1 3 5 | _____ |
| 5. _____ | 1 3 5 | _____ |

Dream Referrals

Relationship

Contact Info (POC/Company)

- | | | |
|----------|-------|-------|
| 1. _____ | 1 3 5 | _____ |
| 2. _____ | 1 3 5 | _____ |
| 3. _____ | 1 3 5 | _____ |

Bad Referrals

1. _____
2. _____
3. _____

Triggers (*What people should be looking for or listening for*)

1. _____
2. _____
3. _____
4. _____

Introductions (*How people can introduce you*)

1. _____
2. _____

Testimonials

- 1.
- 2.

ABC Realty

John Doe
ABC Realty
123 Main St. Anywhere, NC 23153
243-221-5678 johnd@gmail.com

Your Name: _____

Phone #/Email: _____

Weekly Prospects

Relationship

Contact Info (Name/Tele/email)

- | | | |
|---------------------------|-------|-------|
| 1. Mortgage/Loan Officers | 1 3 5 | _____ |
| 2. Real Estate Attorneys | 1 3 5 | _____ |
| 3. General Contractors | 1 3 5 | _____ |
| 4. Residential Cleaners | 1 3 5 | _____ |
| 5. Real Estate Developers | 1 3 5 | _____ |

Dream Referrals

Relationship

Contact Info (POC/Company)

- | | | |
|-------------------------------------|-------|-------|
| 1. Joe Smith, XYZ Property Dev. Co. | 1 3 5 | _____ |
| 2. Mary Jones, Acme Mortgage | 1 3 5 | _____ |
| 3. 123 Builders | 1 3 5 | _____ |

Bad Referrals

1. People who are difficult to work with
2. People looking for commercial space

Triggers *(What people should be looking for or listening for)*

1. "We are expecting our first child and need a larger space."
2. For Sale By Owner signs in a yard
3. "We are looking to move."
4. "We are looking to downsize." "With our youngest going to college, our home will feel large and empty."

Introductions *(How people can introduce you)*

1. "Have you found a realtor to work with?" "If not, can I refer you to John Doe?"
2. "Let me tell you about John Doe with ABC Realty, he is incredible, and I would like to connect you to him. Would it be ok if I had him contact you?"

Testimonials

"John Doe made our home buying experience better than we could have imagined. He helped us find the home of our dreams and was extremely helpful."

"As first-time home buyers, John Doe helped us through the process and got us the best deal possible on our new home. He really cared for us and our needs."

Trigger Sheet Instructions

1. **Header:** Include company logo and contact information of feature presenter
2. **Weekly Prospects:** Referrals sought on a weekly basis. Include specific people, organizations, etc. that you would like to be introduced to.
 - a. **Relationship:** On a scale of 1 to 5, how well does the Member/guest know the prospect?
 - b. **Contact Info (Name/Tele/email):** Member/visitor should provide name and contact information of prospect.
3. **Dream Referral:** Referrals that may transform your business or those that have been difficult for you to attain on your own. This should be specific in terms of individual/organization you are seeking an introduction to.
 - a. **Relationship:** On a scale of 1 to 5, how well does the visitor/guest know the prospect?
 - b. **Contact Info (Name/Tele/email):** Member/visitor will provide name and contact information of prospect.
4. **Bad Referrals:** Include a short list of types of people or organizations that you prefer not to work with or be connected to.
5. **Triggers:** Provide a short list of things that Member/visitor should look or listen for to elicit a referral to you. Include catch phrases or specific identification items.
6. **Introductions:** Provide a statement(s) that the Member/visitor may use to best introduce or refer you.
7. **Testimonial(s):** Include a short testimonial(s) about you, your business, your products/services that would help the Member/visitor to promote or introduce you.

Provide two copies for each Member/visitor.

- One copy should be completed and returned to the feature presenter at the conclusion of the presentation.
- The second copy should be retained by the Member/visitor for follow-up and scheduling of one-to-ones.
- Ensure that all Members/visitors complete the trigger sheet

Trigger Sheet best practices

- Following chapter meeting, review the collected trigger sheets
- Prioritize and schedule one-to-ones with Members/visitors based on information provided
- The goal is to convert the leads provided on trigger sheet into qualified referrals
- Follow up with those referrals



Member Resources

Member Tools and Information

www.bnifelcome.com – A new Member’s site for quick links and essential information.

www.bnibusinesbuilder.com – The eLearning platform that houses thousands of hours of business, leadership, and BNI® related lessons, videos, and podcasts.

www.bniconnect.com - BNI Connect® is used to keep track of all information pertaining to Members and Chapters. There is a full version accessible on your computer web browser and a downloadable mobile app version. (This is where Members enter referrals, one-to-ones, and other member activity.)



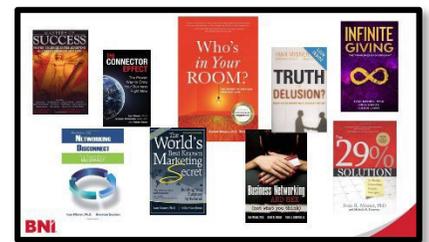
Additional Learning

www.bnipodcast.com - Hundreds of podcasts by the Founder of BNI, Dr. Ivan Misner, and his guests on topics that help you make the most of your BNI Membership.

Our founder, Dr. Ivan Misner, has authored many books about networking and business. Here are some of the most popular titles:

Who’s in your Room
Truth or Delusion?
Masters of Success
Masters of Sales
The Connector Effect
Infinite Giving
Networking Like a Pro

Givers Gain
Master of Success
World’s Best Known Marketing Secret
29% Solution
The Networking Disconnect
Business Networking and Sex, (not what you think)
The Networking Mentor



www.bni.com/#successnet – We invite you to opt-in to receive the official BNI newsletter that provides tips, tools, and techniques to build your business by referral.



<https://www.bnipowerofone.com/> - BNI podcasts focusing on success, increased referrals, tips, strategies, and taking your BNI membership to new levels through the Power of One.

