



## #1 - President or Past President: Roles, Agenda, Expectations & Weekly Commitment

During the One-to-One with a new member it is important that you lead the initial conversation. Many new members don't know what they don't know. They are not sure what is important. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Have a copy of the BNI® Member Policies available during your One-to-One.

### Leadership Team Roles

- President – Facilitates the meeting
- Vice President – Oversees the Membership Committee and tracks attendance
- Secretary/Treasurer – Manages chapter fees as well as collects BNI® membership dues
- Membership Committee – Enforces policies; interviews applicants; reviews participation and handles chapter/member conflict. They MC runs the chapter and makes the important chapter decisions.
- Education Coordinator – Educates members weekly
- Mentor Coordinator – Supports new members
- Visitor Host Team – Greets and supports the visitors
- Communications Coordinator – Weekly BNI Announcements and chapter social media posts

Let the new member know that all members are expected to take roles of leadership sometime during their membership.

### BNI® Weekly Chapter Meeting Agenda

Using a BNI® Member Policies Brochure, review the BNI® Weekly Chapter Meeting Agenda. Ask the new member if they have any questions about the agenda or how the meeting is run. Answer questions or refer to the Ambassador (Member Consultant) or Director Consultant (Chapter Consultant) anything you are unable to answer.

### Expectations & Weekly Commitment

Review basic expectations of BNI® membership, including being on time to the meeting and their commitment to the chapter members. Each week you are expected to give something during the Referrals & Testimonials portion of the meeting. It is always easy to do one of the following three things:

- I have a referral for ...
- I have brought a visitor ...
- I have a testimonial for ...

Share that members are not allowed to pass during this time in the BNI® Weekly Chapter Meeting Agenda. It may negatively impact their membership, and others may perceive them as not contributing to the chapter.

Review the [BNI® Code of Ethics](#) in the Passport.

*Sign the Passport once this section is completed.*





## #2 - Vice President or Membership Committee Member: Rules of the Game (Policies), PALMS Report & Power of One Report/Traffic Light Report

During the One-to-One with a new member it is important that you lead the initial conversation. Many new members don't know what they don't know. They are not sure what is important. The BNI content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

### Rules of the Game (BNI Policies)

Bring a copy of the BNI Member Policies prior to your scheduled One-to-One. Review the policies yourself to make sure you understand them. Ask the new member to review the policies prior to your meeting.

- It is important that every member have a clear understanding of the BNI System. Ask them if there are any policies that they have questions about or need more information.
- The following policies are very important to help the new member understand:
  - General Policy #5: Attendance
  - General Policy #6: Required to bring bona fide referrals and visitors

### PALMS Report

Bring a recent PALMS Report to share with the new member. Describe how BNI Chapters act like a business in order to produce results for its members. In doing so, we track our activity weekly using BNI Connect®. Share recent chapter statistics. Describe the definition of PALMS:

- P: Present
- A: Absent
- L: Late
- M: Medical
- S: Substitute

**Power of One** (average over 6 months) - Bring one visitor per month, 1 X 121 per week, 1 referral per week, 1 CEU (continuing education unit - 1 hour of BNI learning = 1 CEU) per week, Show up or have a Sub each week

Help the new member understand the need to do at least two things each week in addition to attending the weekly meeting: Go over a Traffic Light Report

- Conduct a One-to-One
- Pass a referral
- Bring a visitor (monthly) - define difference between a Visitor and a Guest

Passing referrals may not be possible for new members right away. Referrals are based on relationships and since they are new to the chapter, this must be given time. For a new member it will be easy to do a One-to-One weekly using the Passport and meeting with the Member Mentors. Bringing people to the meeting by simply inviting their contacts adds value to the chapter, regardless of whether that visitor can become a member. Being at the meeting weekly is critical to their membership.

*Sign the Passport once this section is completed.*





## **Secretary/Treasurer: Biography Sheet, Speaker Rotation, Chapter Fees & Membership Renewal**

This is the opportunity to build a relationship and support the new member. The new member will not know what questions to ask of you, so it is important for you to lead the conversation and help them to know what is expected of them. The BNI content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

### **Biography Sheet**

Every new member can complete the Biography Sheet in their BNI Connect® profile. This document can be printed and submitted to your Secretary/Treasurer prior to your Feature Presentation. Every member can deliver a Feature Presentation, allowing them to teach their fellow members how to find referrals for them. The Biography Sheet is used to introduce members just before they present. Here are a few tips on using your Biography Sheet.

- Keep it positive.
- Educate the room to build your credibility.
- When disclosing something no one knows about you, make sure that it builds your positive image, not something embarrassing.

### **Speaker Rotation**

Remind the new member that completion of the Member Success Program in BNI Business Builder and completion of the Passport Program is required prior to being a Featured Speaker. Ask if the new member needs assistance in logging in to BNI Business Builder or BNI Connect.

### **Chapter Fees (if applicable)**

Explain the process of collecting chapter meeting dues, if applicable.

### **Membership Renewal Payments**

- The Membership Renewal process begins 90 days prior to the expiration date.
- BNI® membership dues are due 30 days prior to the due date.
- Renewals are at the discretion of the Membership Committee.

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## **Visitor Host: Visitor Host Experience**

To help new members understand the Givers Gain® value of BNI®, we ask that each new member serve one day with the Visitor Host Team. This will teach the new member that all members are expected to serve on the Leadership Team in some capacity as a way of giving to the chapter, and one of the best first steps is to serve as a Visitor Host for a day. Discuss the importance of visitors at each meeting and that they are the most important people at each meeting. The weekly meeting is for the visitors.

Assign a day for each new member to host. On the day before the meeting, meet with the new member and review what they will be doing during the meeting.

They will be:

- Greeting people as they enter the room; (this applies to both in person and online)
- Providing Visitor Name Badges to guests and visitor;
- Taking visitors/guests into the room introducing them to members in their contact sphere;
- Conducting the Visitor Host Orientation (in person or online)
- They will also do a follow-up phone call that day to at least one visitor/guest to find out what questions they may have after visiting.

## **Day of the Meeting**

Give the new member a name badge that has one of the Visitor Host ribbons. (Be sure to get it back at the end of the meeting for the next person.)

Ask the new member to be the Visitor Host Greeter and help to introduce the visitors to the Leadership Team that day. Remind the new member to leave the visitor with a member, so they can come back to the Welcome Table and greet the next person who arrives including members.

After the meeting, when the time comes to take the visitors out of the room (or in a breakout room online) for the Visitor Orientation to discuss the next steps, let the new member know they will come with you and listen as you help visitors and answer their questions. The new member should be familiar with this as they went through the same process themselves.

At the end of the meeting, answer any questions the new member has and collect the name badge.

Follow up with the new member to find out if they did a follow-up call with an assigned visitor/guest.

*Sign the Passport once this section is completed.*





## #5 - Education Coordinator: Referrals vs. Leads, Continuing Education Units

Being a new member is overwhelming as they try to learn how to participate in the most productive way. One thing that is very confusing for a new member is the difference between referrals and leads. As the Education Coordinator, you play a key role in the education of the chapter members. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

### Leads

A lead involves two people: you and the person you are giving the lead to. There is no time spent speaking to the third person and qualifying that the person needs the product or service.

Example of a Lead – You walk into a neighbor's house and notice that they have a spot on their carpet. When you go back to your chapter, you tell the carpet cleaner that your neighbor needs to have their carpets cleaned. But you never spoke to the neighbor to find out if they wanted to talk to a carpet cleaner.

### Referrals

A referral involves three people: you, the person being referred and the person who is receiving the referral.

Example of a Referral – You walk into a neighbor's house and notice that they have a spot on their carpet. You open the conversation and ask what happened. They tell you what happened, and you tell them about the carpet cleaner in your chapter and ask them if they would like to talk to him. They say "yes." Now you have a referral to pass.

Internal Referrals – These are the very first level of referrals that you will pass in the chapter. These are the ones in which you do business with a fellow member; they are passed internally. You are not required to do business with everyone who is in the chapter, but it is encouraged whenever possible as a way of building trust.

External Referrals – This is like the example of above. You bring a referral from outside the chapter to one of your fellow members. These come with time when you have developed enough trust and knowledge with your fellow members.

### Continuing Education Units

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

Show how to enter CEU's on the BNI App.

1 CEU = 1 Hour of BNI learning (reading a BNI book, listening to BNI podcasts, Taking a BNI advanced workshop or training, Watching BNI YouTube Videos etc)

*Sign the Passport once this section is completed.*





## #6 - Member who does High Quality One-to-Ones: One-to-One Etiquette

There are many steps to the referral process and the very first of those steps is trust. It takes time to build trust and new members may become frustrated if they do not understand this fact. The quickest way to build trust with members is to do quality One-to-Ones. Following are the steps to doing One-to-One meetings with other members. Be sure to have your GAINS Profile and other valuable One-to-One documents prepared to share with the new member. Lead by example!

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

1. Ask – Don't be shy! Every member was new at one time and they understand that One-to-Ones are important to learn about each other.
2. Set a time, day and location that work for both of you. One-to-Ones usually last about an hour but some go longer or shorter depending on your schedules. Be sure to honor each other's time.
3. Show up on time and be prepared. This is not the time to do a sales pitch about your business; this is the time to learn more about your fellow members.
4. Download the One-to-One Meeting Planner and use the GAINS Exchange® to learn about the person with whom you are meeting. The acronym GAINS stands for Goals, Accomplishments, Interest, Networks and Skills. You will not complete the entire GAINS Exchange® in one meeting, so find out as much as you can about the other member.
5. Understand that you will need to do a GAINS Exchange® multiple times before you can complete. And, be sure to update your GAINS Exchange® document regularly.
6. Relax and enjoy getting to know one another. You will learn more about One-to-Ones and GAINS Exchange® by completing the Member Success Program.

*Sign the Passport once this section is completed.*





## #7 - Member Who Effectively Uses BNI Connect®: Chapter Tools

BNI® meetings can be very confusing to an observer and especially to a new member. There are many tools used in BNI® and with a little explanation these tools can assist all members in achieving referral success.

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Have online access to BNI Connect® available during this One-to-One. Active participation in accessing and setting up their BNI Connect® Profile, as well as visually seeing how to enter their activity in BNI Connect® will engage them more with the online tools available to them.

### Chapter Tools of the Trade

1. BNI Connect® Member Profile – Assist the member in accessing and setting up the BNI Connect® Member Profile
2. Referrals Slips – Describe how they are completed on the BNI App. During the Referrals & Testimonials portion of the meeting, members share their contributions for the week.
3. Thank You for Closed Business – The Thank You for Closed Business Program is how we track the money generated by members using the BNI® system. Explain how the TYFCB is entered in to the BNI APP. The person whose name is on the Thank You for Closed Business will get credit for generating business in the dollar amount listed. The person who received the dollar amount remains anonymous.
4. One-to-One Follow-Up – This is entered in to the BNI APP by the member who initiated the One-to-One after the One-to-One has been conducted. Both members will get credit for the One-To-One.
5. Continuing Education Unit – BNI® provides a wide range of training for members to learn the different tools to grow their business using the BNI® system. Share the regional Events Calendar and briefly explain the benefits of each workshop. Then tell them that, after each training, they can enter Continuing Education Units in the BNI App to indicate the number of hours they spent in training. 1 CEU = 1 Hour of BNI Learning
6. Testimonials – When you can do business with a fellow member and it goes well you can give a written testimonial. Put that testimonial in writing so members can use the testimonials on their BNI Connect® profile and for marketing purposes.

Note: All these transactions are entered online in BNI Connect® or on the BNI APP. Prior to each meeting, use the Print Your Weekly Slips feature in BNI Connect® and bring your printed referral slips to be entered into the door prize drawing (if applicable) or use the system that your chapter has set up for this..

*Sign the Passport once this section is completed.*





## #8 - Gold Club Member: Gold Club Badge

This should be a member who has sponsored six or more members into BNI® and has earned their Gold Club Badge. If you do not have a member who has sponsored at least six new members, ask your BNI® Ambassador (Member Consultant) or Director Consultant (Chapter Consultant) to cover this topic.

As a new member it can be hard to pass good referrals because they have not been in the chapter long enough to establish credibility with other members. As the Member Mentor on this topic, you can help them understand that they can have a significant impact on the chapter by bringing people to the meeting for other members to meet.

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

### Inviting & Bringing People

The new member has something that no one else in the chapter has ... their network of people. Introducing the chapter to that network will have a positive impact on the entire chapter with increased referrals, increased membership and increased awareness in the community.

It is important that members understand that everyone is welcome to visit the BNI® Chapter, even those people who could not or would not join the chapter. Guests and visitors alike are welcome in the chapter.

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

### Guests

Those people who cannot join the chapter are known as guests. Guests add great value by carrying the BNI® story into their networks. Guests can refer visitors to the chapter as well as do business with the members.

### Visitors

Those people who come into the room and have the potential to join the chapter because their classification is open are known as visitors. These are the people who could apply for membership. These are the people who grow the chapter.

### Gold Club Badge

This should be a member who has sponsored six or more members into BNI® and has earned their Gold Club Badge. If you do not have a member who has sponsored at least six new members, ask your BNI® Ambassador (Member Consultant) or Director Consultant (Chapter Consultant) to cover this topic.

Gold Club Badges are earned over time and with the persistence of regularly bringing people to the meeting. There is an honor and distinction given to members who have earned this badge.

If you are unclear about the Gold Club Badge Program, ask your Ambassador (Member Consultant) or Director Consultant (Chapter Consultant) for more information.

*Sign the Passport once this section is completed.*





## **Membership Committee Member: Attendance & Substitutes**

New members need to understand two areas of success early in their membership: The Attendance Policy and the Substitute Program. This will be the primary topic of your One-to-One with the new member. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

### **BNI® General Policy #5: Attendance**

Every new member must understand the Attendance Policy if they are going to stay in the chapter. A member may not miss more than three meetings in a rolling six-month period. Upon their fourth absence their classification may be opened by the Membership Committee.

BNI® makes it easy to be in attendance by using the Substitute Program.

### **Substitute Program**

Members can have a qualified substitute to attend the meeting for them in the event they cannot make the meeting. The best substitutes are those who can benefit the chapter the most. The best substitutes are your customers who can speak very positively about the new Member's business. It is also nice if different substitutes are utilized so that the chapter can have the opportunity to expand their network when you need to get a substitute.

BNI® General Policy #12: In case of problems with a member, Membership Committees may, at their sole discretion, put a member on probation relating to the member's business practices or commitment to the chapter.

Assist the new member in identifying five qualified substitutes. Encourage the new member to invite their substitutes to the meeting prior to needing them as a substitute. Making the substitute feel comfortable with BNI® System and meeting process in advance will increase the likelihood that a substitute will show up when needed.

*Sign the Passport once this section is completed.*





## **Member Who is a Lifelong Learner: Learn More to Earn More**

This should be a member who regularly attends local trainings to enhance their BNI® Member Experience and effectively grow their business using the power of education. If you do not yet have a member who is engaged in local trainings and BNI® University.

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

### **Events Calendar**

Review your regional Events Calendar.

Show how to find and register for events online.

Identify future local trainings that would benefit the new member, such as:

- Advanced Member Trainings
- Leadership Team Training
- BNI Connect® Webinars
- Other Local Trainings
- Courses/Podcasts/Videos in BNI Business Builder

### **BNI® Business Builder**

Ensure the Member knows how to access BNI® Business Builder through the web application or the mobile app.

Show the new Member how to access the Member Success Program modules on BNI® Business Builder from the home screen. Show them the BNI® Podcasts are under Courses and the Ultimate Success Program is under curriculum.

Show them the BNI® Business Builder Leaderboard.

Lastly, discuss importance of always investing in your personal and professional growth whether it is in person training or online training.

*Sign the Passport once this section is completed.*

