



# **President Role Training**

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- **To lead the chapter in energy and positive attitude.**
- **To set chapter goals along with the leadership team.**
- **To run the first half of the Chapter Success Meeting.**

# MEETING AGENDA

- Every BNI meeting is to follow the same agenda. It is a part of the BNI brand. It has been honed for effectiveness and enables an efficiently run meeting. There are a couple of places where there is a little room for reordering that we will cover here.
- Don't read the script, but have it in front of you to follow.
- The online President training goes much more into the “why” of the agenda sections than we will go into today.

# Meeting Agenda Outline

1. Open Networking
2. Welcome Visitors and Introduce Leadership Team
3. Focus Core Values
4. Purpose/Overview of BNI® and Mission Statement
5. Networking Education
6. Recognition
7. Welcome New and/or Renewing Members to the Organization
8. Members Introduce Themselves and Give their Weekly Presentation
9. Welcome Visitors to BNI® and Have Members Introduce Them
10. Vice President's Report
11. Membership Committee Report
12. Secretary/Treasurer Announces Speaker Rotation
13. Speaker(s) Give 5-12 Minute Feature Presentation(s), Including Questions and Answers
14. Referrals and Testimonials
15. President Thanks Visitors
16. Secretary/Treasurer's Report
17. BNI® Announcements, Reminders and Special Reports
18. Door Prize Drawing(s), for Members Bringing Visitors or Referrals
19. Close Meeting



# MEETING AGENDA DETAIL

The Leadership Team and Visitor Hosts must arrive a minimum of 15 minutes prior to the designated meeting time to welcome visitors. **Note:** The Chapter Leaders will make or break the quality of most meetings! They must be positive, professional, and enthusiastic.

# MEETING AGENDA DETAIL

## 0:00 -1. Open Networking

**Goal:** The meeting begins punctually with 15-minutes of open time for Members to build stronger relationships with each other and to meet visitors. Members should follow-up on referrals given and set-up One-to-Ones. Use this time to foster stronger relationships with Members you know and initiate relationships with Members you haven't connected with. Plus, make a point to meet visitors and welcome them to your Chapter.

# MEETING AGENDA DETAIL

## 0:15 -2. Welcome/Introductions

**Goal:** The President welcomes everyone to the Chapter meeting, invites them to take their seats. The President then introduces Chapter leadership and welcomes Visitors and subs.

**President Script:** “Ladies and Gentlemen, please take your seat for the next part of the meeting. Take a moment to silence your electronic devices. At this time, will the Leadership Team and Support Leadership Team Members please stand and state your name and position.”

I’d also like to welcome our Visitors and Substitutes. Visitors, please stand and state your name, business name and who invited you here today. Substitutes, please stand state your name, business name and who you are substituting for today.”

After Visitor Introductions, “We are glad for each of our visitors today. We are interviewing good business people that we can give all our referrals to. Your goal today is to experience a meeting, see that we are focused on helping each other grow. At the end of our meeting today [Visitor Host’s name] will meet with you briefly to discuss with you your thoughts on the meeting and the best way to move forward from there. Sound good?”

**BNI** “I’d also like to introduce our visiting Director/Director Consultant and Ambassadors today.”

# MEETING AGENDA DETAIL

**President Note:** Observers, including those from newly forming Chapters, should designate one representative to speak on behalf of all observers.

## Key Points:

- Allows extra visibility for Members who hold leadership positions
- Educates Visitors on Chapter roles and responsibilities
- Reminds Members who they can go to for assistance in a specific area
- Shows structure, support and Member involvement

# MEETING AGENDA DETAIL

**0:16 -3. Core Values**

**Focus Core Value of the Week and What it Means to Him/Her**

**Goal:** Discussing a Core Value each week reinforces BNI's Core Values to the Members.

**President Optional Script:** “Each week, it’s great to remember our Core Values and what binds us together as Members of BNI®. Today, I’d like to share <core value> and why that’s important to me ...”

# MEETING AGENDA DETAIL

## 0:17 -4. Purpose/Overview & Mission Statement

**Goal:** The President recognizes a Member to tell share the impact BNI has had on their business. Consider if there's someone you know who would appreciate hearing this story to encourage them to visit your BNI Chapter.

**Alternative Script:** “Additionally, BNI® is the most successful organization of its type in the world. Currently, there are over \_\_\_\_\_ Chapters and more than \_\_\_\_\_ Members worldwide. In the last 12 months, BNI® Members passed over \_\_\_\_\_ referrals and this translates into over \_\_\_\_\_ in business being passed between Members. The BNI® philosophy is Givers Gain®: If I give business to the Members of my Chapter, in return they will want to give business to me.”

### Key Points:

- Gives Visitors an opportunity to hear Members' positive testimonials about how BNI® is effective

# MEETING AGENDA DETAIL

## 0:18 -5. Networking Education

Turn the floor over to the Education Coordinator for 3-5 minutes of networking education.

### Key Points:

- Can be used to highlight those who have excelled in Member participation (for example, inviting Visitors or passing referrals) by having them share their techniques
- An opportunity for general coaching on Membership Committee concerns delivered in a positive way

# MEETING AGENDA DETAIL

## 0:21 -6. Recognition

**Goal:** During the first meeting of the month the Vice President recognizes Members who made remarkable efforts in the previous month. Make a note to congratulate Members on their achievements to become Master Connectors themselves. Study what successful Members do, that make them so effective. Then make plans to go beat them next month.

The example below is for the monthly recognition of high performing Members through the Notable Networker Certificates. If there is more opportunity for recognition outside of the Notable Networkers, this time can be used.

**Vice President Script:** “For the previous month, we’d like to acknowledge our top- performing Members for ...

Most Chapter Education Units completed, Most Visitors brought, Most One-to-Ones conducted, Most Referrals given, Most Thank You for Closed Business generated. We encourage you to schedule a One-to-One with these Notable Networkers.”



# MEETING AGENDA DETAIL

## Vice President Note:

Consider framing the Notable Networker Certificates, in advance. Have recipients come to the front of the room to be recognized.

## Key Points:

- Gives praise and appreciation to the Members
- Encourages Members to continually participate in the BNI® program
- Creates an opportunity for additional visibility with social media
- Encourages Members to find additional referrals to thank the Notable Networkers

# MEETING AGENDA DETAIL

## 0:24 -7. Welcome New and/or Renewing Members to the Chapter

**Goal:** A fun celebration of new Members and anniversaries. New and/or renewing Members (who have been approved by the Membership Committee) come to the front of the room for a formal induction into the Chapter. The President explains the contents of the Member Success Kit to newly accepted Members emphasizing the use of the name badge and lapel pin outside of the Chapter meeting. Chapter Members stand and recite the BNI® Code of Ethics with the new Member. The existing Members agree to support the new Member as they become a contributing part of the team. Aim for making an impact and having fun! Welcome new and renewing Members warmly into the Chapter with a round of applause.

**President Script:** “I’d like to welcome our new and renewing Members to the BNI® \_\_\_\_\_ Chapter. Please come to the front of the room so we may formally induct you. Members please stand for the BNI® Code of Ethics. New Members: Please share why you applied for membership in our BNI® Chapter. Renewing Members: Please share why you chose to renew your membership in our BNI® Chapter. New Members, please stay after the meeting today for a New Member Orientation.”

# MEETING AGENDA DETAIL

## Key Points:

- Celebrates Chapter growth
- Reconfirms commitment to the BNI® Code of Ethics
- Demonstrates a warm welcome to the Chapter
- Asking Members and Visitors why they chose to (re)apply to our BNI® Chapter provides positive feedback for the entire Chapter and good reasons for Visitors to join.

**President Note:** Be sure to notify new and renewing Members in advance to be prepared to briefly share why they applied for or renewed their BNI® membership.

# MEETING AGENDA DETAIL

## 0:26 -8. Weekly Presentations

**Goal:** This is the second most important part of the meeting. Each Member introduces themselves, explains to Members what they do and asks for connections to their best target customers. Your 30- to 60-second Weekly Presentation to educate your referral marketing team on who you are, what you do, how you add value and how to find referrals for you. While listening to each Member, consider whether over the last week you've heard anyone using the language of referrals to signal the opportunity for referrals.

**President Script:** “Members will now give their Weekly Presentations. This is your opportunity to continue the process of educating your referral marketing team on who you are, what you do, how you add value and how to find referrals for you. Please include your name, business name and specific referral request. Substitutes, During Member introductions, give the Weekly Presentation for the Member you are substituting for. We will be timing our Weekly Presentations today, so keep your eyes on our timekeeper.”

# MEETING AGENDA DETAIL

## President Note:

- Include BNI® Ambassadors and Directors with the Members, if in attendance.
- When people exceed their time, please stand and say Thank You.
- When the Chapter membership exceeds 60 Members, it is important to expand the meeting time from 90 minutes. Each Member needs to have at least 30 seconds to complete their Weekly Presentations as a Member benefit.

**Secretary/Treasurer Note:** The timekeeper may consider using the BNI® Timer App or flags for timing Weekly Presentations. For example, the yellow flag means you have 10 seconds, the red flag means time is up.

# MEETING AGENDA DETAIL

## 0:49 -9. Guest/Sub (Visitor?) Commercial

(After all Members have presented) “Now it is time for our guests to give your Weekly Presentation. Please educate us on your business and tell us how we can find referrals for you. You will also be timed so keep your eyes on our timekeeper.”

# MEETING AGENDA DETAIL

## 0:51 -10. Vice President's Report

**Goal:** To keep Members excited about generating referrals, the Vice President provides the “PALMS Report” providing the average number of monthly referrals, average number of monthly visitors and the total referrals to date. Identify where you are on the report and consider how you can pass more referrals and sponsor more Members to practice Giver's Gain and increase the results of your Chapter. This weekly report is derived from the Summary PALMS Report in BNI Connect® and is no more than two minutes in length.

# MEETING AGENDA DETAIL

## 0:52 -11. Membership Committee Report

**Goal:** Delivered by the Vice President or a Membership Committee Member, this report updates Members regarding professions still needed in the Chapter, pending applications and policies and matters of interest from the Membership Committee. Fill in gaps within your referral network by inviting visitors and sponsoring new Members.

### Key Points:

Mention the professions of the visitors in the room as professions that the Chapter is seeking to fill. This will make the Visitors feel welcome and important.



# MEETING AGENDA DETAIL

## 0:53 -12. Introduction of Featured Speaker(s)

**Goal:** The Secretary/Treasurer announces the speakers for the next six weeks and introduces this meeting's speaker using the Member's Biography Sheet. Pass along any questions you have to upcoming featured speakers. It will help your Member give a better presentation by customizing it for the needs of her fellow Chapter Members.

### **Secretary/Treasurer Action:**

- Announce upcoming speakers for the next six weeks.
- Remind upcoming speakers to bring a door prize.
- Deliver an engaging, professional introduction for this week's Featured Speaker(s) using the Biography Sheet.

# MEETING AGENDA DETAIL

## 0:54 -13. Speaker(s) Give 5-10 Minute Feature Presentation (Graduation of new members)

**Goal:** One or two Members provide a presentation that gives Members greater clarity as to the target market and business to help generate more referrals. Always listen with a “beginner’s mind.” Look for new ideas or for things you used to know but have recently forgotten. A 5- to 10-minute detailed business presentation.

**President Script:** “Now that we know more about \_\_\_\_\_, let’s do our best to bring him/her a referral next week.”

# MEETING AGENDA DETAIL

## 1:04 -14. Referrals & Testimonials

**Goal:** All Members **stand** for this, the most important part of the meeting. Members report referrals given or provide a testimonial for any Member of the Chapter. Make the decision to set aside the time throughout the week to ensure you always have a referral to report or a testimonial to provide.

**President Script:** “This is the most important part of the meeting. All Members of this Chapter stand at their turn and participate. Keep it brief and positive. Start with ‘I have ...’ Examples include referrals, visitors or testimonials. All other activity should be recorded in the BNI Connect® Mobile App. Visitors, tell us briefly what impressed you most about the meeting.”

# MEETING AGENDA DETAIL

## President Notes:

It is important that the energy is very high during this part of the meeting. It is the most important part of the meeting.

Remind Members to be excited. They are helping a Member grow their business.

Have each Member state how many referrals and visitors they have before naming the Members. “I have 3 referrals, one for Walter for copywriting, one for Wes for travel and one for Lannie for coaching.”

At the end, give a summary of how many referrals and visitors were reported in the meeting. “In summary, we had 3 visitors and passed 68 referrals this week. That is 68+ opportunities to close sales.”

## Key Points:

- Members are encouraged to focus their testimonial time on one person as well as submit it in writing.
- Starting with Members allows visitors an opportunity to observe then comment on the power of the Referrals & Testimonials.

# MEETING AGENDA DETAIL

## 1:24 -15. Visitor Recognition

**Goal:** The President excuses visitors to another room to speak with the Visitor Host for more information to consider applying for membership in the Chapter.

**President Script:** “Visitors, do you think your business could benefit from referrals from Members of our BNI Chapter? Only one person can become a Member from your BNI® Classification. Positions tend to fill up very quickly. Upon acceptance by the Membership Committee, you will lock out your competitors from the Chapter!”

Will the Visitor Host Team please stand? Will our Visitors please stand? Thank you for being here today. The Visitor Host Team will now meet with you to answer any questions and to walk you through the next steps. You may leave your things here, as you may come back and network after the brief orientation is complete. Thanks again for being here this morning!”

# MEETING AGENDA DETAIL

## 1:26 -16. Secretary/Treasurer's Report:

**Goal:** Increase Member renewal rates by inviting expiring Members to renew. At the first meeting of the month, announce Members up for renewal as indicated on the Membership Dues Report in BNI Connect®.

Secretary/Treasurer Script: “The following Members are up for renewal in the next 90 days ...

\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_. To apply for renewal of your membership, please submit your Renewal Application online in BNI Connect® and payment ay BNISouthCentralIN.com or see me for details.”

# MEETING AGENDA DETAIL

## 1:28 -17. Announcements, reminders, and special reports

**Goal:** Deliver more value to Members and increase participation at other BNI networking events, Member training programs and other regional activities.

### Key Points:

- Use this as an opportunity to promote upcoming events. Have Members share testimonials on their past experience attending these events.

# MEETING AGENDA DETAIL

## 1:29 -18. Door Prize Drawing(s) for Members Bringing Visitors or Referrals

**Goal:** A celebration, a chance to have fun and build relationships among Chapter Members. The Door Prize Drawing is recognition for Members bringing Visitors or referrals. Each featured speaker brings a door prize. The Vice President conducts the drawings each week.

### Vice President Notes:

- Prior to the meeting start, ensure that today's door prizes are present and business appropriate.
- Executive Team does not bring a door prize when they are speaking.
- Ensure the Chapter has a backup plan for a door prize.



# MEETING AGENDA DETAIL

## 1:30 -19. Close Meeting

The President or a designated Member gives a positive quote for the week and requests that Members focus on bringing referrals or visitors for the next meeting. Additionally, the President ends the meeting with:

***“We will see you all at next week’s meeting, which begins ... right now!”***

Immediately following the meeting, the President or Mentor Coordinator conducts a New Member Orientation and informs new Members that they have 30 days to complete MSP, 60 days to complete Smart Start, and 90 days to complete their passport. They will then graduate and be put into the speaker rotation.

# CHAPTER SUCCESS MEETING

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## What is it?

- Monthly meeting of the leadership team to plan, gauge, and strategize on behalf of the chapter
- Same day and time every month (eg First Thursday of the month at 11am.)
- Always held on Zoom
- President runs the first half of the meeting

# CHAPTER SUCCESS MEETING

1. Review action items from last meeting.
  - a. The Vice President reads from the previous month's Chapter Success Meeting Report any action items documented.
  - b. Each person who received an action item from the previous meeting reports on the status.
2. Review visitor attendance
  - a. The Secretary/Treasurer or Visitor Host Coordinator reports the number of visitors in attendance last month.
  - b. The Secretary/Treasurer or Visitor Host Coordinator states, by name and category, the visitors who submitted applications.
  - c. The Secretary/Treasurer or Visitor Host Coordinator states, by name and category, the visitors who could convert to Members with some additional follow-up.

# CHAPTER SUCCESS MEETING

3. Membership Review – This information can be pulled from the Roster Sheet dated the previous month.
  - a. The Vice President or assigned Membership Committee Member reports the number of new Members last month and mentions them by name.
  - b. The Vice President or assigned Membership Committee Member reports the number of dropped Members last month and mentions them by name.
  - c. The Vice President or assigned Membership Committee Member discusses with the attendees the net growth for the previous month. The goal of the Chapter should be net one if the Chapter wants to remain the same size and net two or more if the Chapter wants to be on a growth path.

# CHAPTER SUCCESS MEETING

4. Reports Review – Reports needed include the Chapter Roster Report and Chapter Traffic Lights.
  - a. Review the Chapter Roster Report to determine if the Chapter has a complete Leadership Team. If not, the Leadership Team Members with open roles should fill those roles within the next month.
  - b. Review the Chapter Roster Report to determine how the Chapter performed in the three-month PALMS. It is important to look at this trend compared to the Chapter Traffic Lights to see if there is a change in performance. The Chapter Traffic Lights shows the last six months which makes it hard to see recent trends.
  - c. Review the Chapter Traffic Lights. The Chapter should have the goal of being in the top percentage bracket in all areas if possible. Depending on the size of the Chapter and the goal for inviting visitors, it may be acceptable for the visitor conversion rate to be lower than the maximum point value.

# CHAPTER SUCCESS MEETING

5. Other topics as needed
  - a. Secretary/Treasurer reports on Chapter finances.
  - b. Should the Chapter be looking for another venue? How are venue relations?
  - c. How can concerns be addressed before they become written complaints?
  - d. How did the weekly meeting look to the Director Consultant?
  
6. Passport to Success
  - a. Discuss each Member by name and his/her progress through the program generally.
  - b. Discuss in detail new Members who are not on track. Brainstorm ideas to help him/her get back on track.

*At this point the President, Secretary/Treasurer and Visitors Host may leave the meeting.*

# **BNiConnect: Quick Pathways to Success**

## **President**

**Enter Goals:** Operations >Chapter >Manage Goals >Enter Chapter Goals

**View Goals:** Operations >Chapter >Manage Goals >View Chapter Goals

**Sponsorship:** Reports >Chapter >Sponsor Report

**-Reporting 2 You-**





**Education Coordinator  
Role Training**

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# **What is the purpose of the Education Coordinator?**

- **To teach the chapter how to be better networkers during the weekly meetings**
- **The lesson is to stay within 3-5 minutes**
- **Topics can be assigned by the leadership team based on discussions during the Chapter Success Meeting**
- **The Education Coordinator is not expected to teach every week. They can assign topics to other members.**

**Where do I find content to teach on?**

**BNI Business Builder**

**Regional Newsletter**