

VISITOR Ideal Timing for Contact

The following timeline is suggested for best results engaging Visitors. Because contact with Visitors is often an indicator of motivation to apply for Membership, Visitor Host Teams can use this as a guide and best practice. Automated emails will be triggered and sent from BNI Connect when Visitors register, so you may choose to use text or phone calls instead of more emails.

START*

* Qualified Visitors are professionals whose category is not already represented in the Chapter and who could apply to join as a Member.

DAY BEFORE THE MEETING

Designated Member email, text, or call Visitors to ensure they have proper time / place / link of meeting. See suggested talking points in this document. Consider making a call or sending a text rather than one more email.

DAY OF MEETING, 30 MINUTES BEFORE OPEN NETWORKING BEGINS

Visitor Hosts gather list of registered Visitors and arrive at meeting location / log into Zoom. Greet Visitors as they arrive, offering to introduce them to referral partners. If in person, be sure to greet Visitors as soon as they arrive and lead them to the registration table.

START OF OPEN NETWORKING

As everyone gets seated, ensure that Visitors are next to someone who will help them navigate the meeting. If on Zoom, encourage them to use and save the chat to make strategic connections. Also encourage Visitors to make a note of people they'd like to meet so you can facilitate introductions.

BETWEEN MEETINGS (OPTIONAL)

Designated Member may want to call, text, or email qualified Visitors* from the week before to invite them to another meeting if they have not filled out an application.

NEW MEMBER

WITHIN 24 HOURS OF MEETING

Designated Member will call Visitors. This can be someone from the Visitor's Contact Sphere, the person who invited the Visitor, Visitor Hosts, President, or Membership Committee. Potential conversation elements are included in this document. This is CRUCIAL and can make the difference between a Visitor submitting an application or not.

VISITOR ORIENTATION

Excuse Visitors to meet with Visitor Host. Explain importance of referrals in lead generation, offer to make introductions to strategic Chapter Members, explain time and financial investments, and offer opportunity to apply for Membership.

TWO DAYS BEFORE MEETING

Check for registered Visitors. Email any who are listed with sample email in Five Steps document, also included here. Include You've Been Invited document in email. Texting and calling Visitors is a nice touch, as well.