

# The BNI Visitors Day Playbook



## Business People Welcome

Learn how to grow  
your business



## A Strategic Plan to Successfully Grow Your Chapter

# The BNI Visitors Day Playbook

## Visitors Grow Membership in Your Chapter

Chapters that plan well for a Visitors Day can enjoy tremendous results. This playbook has been designed to help you keep track of all the moving parts of an in-person Visitors Day. As you work with this plan, please keep in mind that every person you meet and contact for Visitors Day is also your potential new client or customer. Remember to incorporate your business into these activities.

The Visitors Day Playbook is a well thought out plan to provide an opportunity for more business by adding new members to your chapter. It takes work and team effort. You know what they say about the secret of success? Without a little bit of work, it's still a secret!

*A Visitors Day is about growing membership in your chapter. This is not Guests Day. What does that mean? For this Visitors Day, only invite those that have the potential to fill one of the seats in your chapter. Other BNI members from other chapters and those that represent a seat already held by a member cannot grow your membership.*

**Pro Tip:** the same Visitor that you keep inviting over and over is probably not a great visitor for the Visitors Day. The intent of the Playbook is to create a chapter event to build profitability, membership, referrals and enthusiasm!

**A Visitors Day is a Membership Drive.** This means that every step taken is with the purpose of selling the benefits of your chapter to potential applicants. As entrepreneurs and business owners, we are in the business of selling. The best selling feature in a Visitors Day is the enthusiasm that comes through when you tell your BNI success story. By all members participating in the planning *and* execution of a Visitors Day, your visitors can experience the intangible benefits of being part of your chapter.

Visitors attend with a WIIFM mindset: "What's In It For Me"? Be prepared to respond. Ultimately, this is Grow Your Business Day, for both Members and Visitors.

## How to Use This Playbook

Each section focuses on a different part of the Visitors Day planning timeline and guides you through all the activities required to execute a Visitors Day, from date selection through to follow-up.

Sprinkled throughout are checklists to help you organize your activities, take notes, and track your progress. At the end of the Playbook is a summary checklist of the major tasks required, so you can know at a glance where you are at, and what tasks are still outstanding.

You can print this guidebook and have a written copy, and/or upload it to a shared area for the whole Visitor Day Planning team and make use of the fillable fields.

Always be looking ahead to what's on the horizon, so you can be prepared for each week's deliverables.

Have fun, and happy connecting!

# 1. VISITORS DAY PRE-PLANNING

Your chapter's Community Builder Chair is the point person for a Visitors Day. They are responsible for announcing weekly tasks and updates, collecting information from members, planning and executing logistics and ensuring everyone is prepared for a successful Visitors Day. Like everything in BNI, it is not done in isolation; it takes the coordinated efforts of a team. Ensuring everyone knows their role and understands the purpose and value of each activity is critical.

*Your Feature Presenter runs the Visitors Day. This is a TWO-hour meeting including pre-agenda open networking and Visitor Orientation. (Time for setup and knockdown needs to be factored in.) There is a suggested Modified Agenda to work through with the Feature Presenter further in the Playbook.*

## Step #1: Confirm Date and Feature Presenter

Coordinate the date of the event with your Feature Presenter. Choose 2-3 dates for them to choose from. Potential Feature Presenters are:

- Chapter Consultant
- Executive Director
- Franchise Manager
- Launch Consultant
- Chapter Member with good Conversion / Closing skill

A member of the Regional Team (as noted above) is equipped to speak at the meeting to explain the benefits of belonging to BNI and to encourage visitors to join that day.

All members of the Leadership Team must be present on Visitors Day. The President, Vice-President, Secretary-Treasurer, Visitor Host, and Membership Committee will need to stay after the Visitors Day to delegate and distribute the remaining two weeks of follow up.

**PLAYBOOK NOTES: Date, Feature Presenter and Team**

Confirmed Date		
Confirmed Feature Presenter	<name>	<email>
Meeting START and END time		
Early arrival time for setup	<30-45 minutes early>	
Schedule final planning meeting one-week prior		
<b>Confirmation of LT members attendance:</b>		
<b>Role</b>	<b>Name</b>	<b>Confirmed to attend</b>
President		
Vice President		
Secretary-Treasurer		
MC – Community Builder		
MC – Quality Assurance		
MC – Engagement		
MC – Member Relations		
Education Coordinator		
Visitor Host Coordinator		
Mentor Coordinator		
Communications Coord		
VH Team member		
VH Team member		
VH Team member		
VH Team member		
VH Team member		
VH Team member		

## Step #2: Confirm Goals and Expectations

A successful Visitors Day is measured by the number of new members. Set a goal for how many members you would like to gain from your Visitors Day. From there, set the expectations for member participation.

Statistics show that of the Visitors that are in attendance on Visitor's Day, about 10% will apply to your chapter. Check your Chapter's (Visitor to Member) conversion rate and use that as a basis for the minimum number of invitations each member is expected to bring. Use the example below to help you determine the best number of invitations to obtain your new member goal.

25 members x 40 Visitor invites each		= 1200 Visitor invitations
Follow up calls generate "yes I'll attend" 10%		= 120 Visitors registered
Actual Visitor Day attendance of	50%	= 60 Visitors attend
Conversion of Visitor to Applicant at	10%	= 6 applications
Factor in duplicates and not good fit		= 4-5 new members

## Method of Invitation: Printed and Digital

It is recommended to create a Chapter Invite postcard for your Visitors Day. Depending on your Chapter budget, each member will be provided with (or will need to provide) envelopes and stamps. Their business card goes in with the postcard invitation. Envelopes are handwritten as people are more likely to open an envelope that is personalized and handwritten. Samples of postcard mailers can be found in the Visitors Day Resource page.

You may want to consider sending an email invitation *in addition* to a printed & mailed invitation. You can attach a digital copy of the postcard to a well-designed email. Create a standard email invitation and provide to each member. The invitation is the reason for the follow up phone call:

*“Hi, my name is < ..... >; I put an invitation in the mail for you last week, did you receive it?”*

Regardless of the person’s response (“yes” or “no”) you can continue the conversation with a verbal invitation.

***\*\*\* The Fortune is in The Follow Up \*\*\****

## Participation: Rewards and Consequences

This is an opportunity for each member to create meaningful new relationships for themselves and their customers. It is expected that each member has at least one Visitor in attendance. When everyone does their part, everyone benefits. Creating the expectation for member participation – and then following through on that expectation – is critical to the success of your chapter’s Visitors Day. This includes defining both rewards and consequences.

Rewards – many chapters have had great success with a sponsorship challenge. This strategy provides encouragement for “doing the things” required to get qualified visitors registered. It also puts greater weight on growing the chapter.

A sample Challenge could look like:

- Complete each weekly task on time 3 points
- Contact is mailed an invitation 1 point
- Visitor is registered 2 points
- Visitor attended 5 points
- Visitor applied 5 points
- Applicant becomes member 20 points

Maintain a Leaderboard and have the Community Builder report on the progress each week during Announcements to fosters excitement and anticipation.

Having several prizes helps keep everyone engaged, such as Most Visitors Registered, Most Visitors Attended, Most Sponsored New Members and Most Overall Points. Use your knowledge and insights about your chapter to create a challenge that is both rewarding for your members and focuses on the goal: more members.

Defining consequences of non-participation is never easy. The Power of One indicates that each member is expected to bring one Visitor per month. Non-participation hurts member credibility and chapter morale and doesn't contribute to the goal of Visitors Day. For members that have a hard time with inviting, find ways to encourage and support them, and be clear about the negative consequences. Provide members who didn't contribute with an opportunity to gain credibility without it being seen as a penalty. Suggested credibility-gaining opportunities include:

- Sponsoring a new member in the next 90 days, and/or
- Bringing x visitors to the chapter in the next y weeks

Include consequences of non-participation along with the rewards, so there are no surprises. By doing the work now and being part of the Visitors Day, they can focus afterwards on building relationships with the new members, instead of loading up on more visitors.



## PLAYBOOK NOTES: Goals & Expectations

Goal	# New Members	
Goal	# Visitors - maximum	
Expectation	# Invitations per member	
Expectation	# Registered Visitors per member	
Expectation	# Visitors in attendance per member- minimum	
Reward	Challenge details	<point system>
	Prizes for Challenge	< metrics and prize for each>
Consequences	Consequences details	
	Door Prizes for Visitors (optional)	

## Dress Code

Your weekly chapter meeting is a professional business meeting. All members should dress accordingly. This doesn't need to mean suit up; what it does mean is dress for your best client. Many venues have a no-jeans policy, and it lessens credibility when members choose to not dress for success.

Ensure your Visitors know your chapter's and your venue's standards for dress code.

### Step #3 Confirm Venue

If your current meeting location isn't large enough to support your Members and many Visitors, a suitable location needs to be arranged for the Visitors Day. The recommended ratio of Members to Visitors is 2:1. This way Members can focus on and connect with the Visitors. If a Chapter has too many who want to attend, it is a great opportunity to hold a second Visitors Day. There is nothing wrong with selling out your Visitors Day, and messaging around "limited seating" can be used as a marketing tool.

#### PLAYBOOK NOTES: Venue

Venue	Confirm capacity of # members x 3	
Location	Same or alternate	
Visitor Fee	Same as members, or more (+10%)	

## Step #4 Confirm Marketing

Getting the word out through social media is an effective no-cost way to increase exposure to your event. As soon as you know the date and the Feature Presenter, you can start promoting. Suggestions for posting include:

- Public Chapter Facebook page
  - Weekly (1-3x/week) posts; have each member share to their own feed
- BNIBC.CA and BNI-INDIANA.COM Chapter webpage newsfeed
- LinkedIn, Twitter, Instagram if your chapter has created accounts
- Current Branded signage
  - Tablecloths, roll-up banners, tent cards

This is the responsibility of the Communications Coordinator to plan and execute. If they do not have good social media, marketing or graphic design skills, they can enlist other members to assist.

### PLAYBOOK NOTES: Marketing

Email		
Facebook		
Insta		
Twitter		
BNIBC newsfeed		
Branded supplies		
Printed supplies	Chapter business card Level of interest form Postcard mailer	

## Step #5 Confirm Budget

Depending on your chapter's bank account balance, Members may not be required to submit additional funds to cover the additional costs associated with a Visitors Day. One exception may be because you've chosen a different venue to handle the expected capacity, and it will cost each member a nominal amount to cover the per-person cost. You may still have enough in your chapter funds to take care of that.

Other associated costs will include marketing costs. Is the chapter paying for envelopes, stamps, postcard mailers, or are the Members paying for their own invitations? Are you conducting any paid advertising for the event?

One last consideration is the Visitor fee. Are you going to charge the same amount as you would a member, or more? A general recommendation is to charge a Visitor approximately 10% more than what a Member pays.

If you are conducting a challenge with your Members with prizes, then you will need to have funds to cover prizes. Prizes may be cash or product, but not services from a member unless it is self-contained, meaning that a member doesn't have to pay more to get the full value of the service given as a prize.

It is the responsibility of the Secretary-Treasurer to keep a close eye on chapter funds and cashflow, to ensure that all your costs are covered.

## PLAYBOOK NOTES: BUDGET

Additional cost / member		
Postcard mailer		
Mailing supplies		
Additional marketing		
Prizes		
Branded supplies		

Current bank balance		
Estimated total cost		
Surplus / shortfall		
# Visitors (estim.)		
Visitor fee		
Revenue from Visitors		

## 2. WEEKLY PLANNING ACTIVITIES

From the point a Visitors Day is announced, there are announcements, education opportunities and deliverables each week leading up to the event. Behind the scenes, the Visitors Day Planning Committee is in motion:

- The Community Builder Chair (CB) continues to coordinate logistics with the LET, the Visitor Host Coordinator and the Feature Presenter.
- The Education Coordinator (EC) plans an education moment each week around the theme of Visitors. They can also recommend relevant podcasts and Walker This Way videos for CEUs.
- The Communications Coordinator (CC) provides public-facing social media posts and provides a challenge Leaderboard update during Announcements.
- The Visitor Host Coordinator (VHC) and team strategize roles:
  - Call Visitors the day before to confirm
  - Visitor Registration table; verify supplies (name badges, pens, cash, interest forms etc.)
  - Greeters; coordinate pre-meeting networking
  - Call Visitors after the meeting
- The Secretary-Treasurer (ST) monitors the budget and cashflow
- The Members focus on invitations and registering Visitors. There is power – and excitement – in numbers; the more members actively involved, the more everyone *wants* to be involved.

## Eight Week Plan

<b>Weeks Prior</b>	<b>Community Builder</b>	<b>Education Coordinator</b>	<b>Member</b>
8	<ul style="list-style-type: none"> <li>Announce date, expectations (from pre-planning decisions):</li> <li>2-hour mtg</li> <li>1st time Visitors only</li> <li>Goal for growth (how many new members)</li> <li>Member Sponsorship Challenge</li> <li>Distribute Member worksheets</li> </ul>	What is a "Qualified" Visitor	Start invitation list
7	<ul style="list-style-type: none"> <li>Announce Details of Member Sponsorship Challenge (if conducting one)</li> <li>Review and finalize invitation; arrange for printing</li> </ul>	How to Invite	Continue list-building
6	<ul style="list-style-type: none"> <li>CB - collect names, announce challenge stats</li> <li>distribute invitations</li> </ul>	Use Social Media to invite your network	Provide 20+ names with full contact details to CB
5	<ul style="list-style-type: none"> <li>CB - collect names, maintain confirmations;</li> <li>announce professions wanted that have registered and yet to register;</li> <li>announce challenge stats</li> <li>provide follow-up call script</li> </ul>	Plan your weekly presentation for Visitors	provide additional names to CB
4	<ul style="list-style-type: none"> <li>CB - collect names, maintain confirmations;</li> <li>announce professions wanted that have registered and yet to register;</li> <li>announce challenge stats</li> </ul>	Importance of Follow up with Visitors	send out invitations

<b>Weeks Prior</b>	<b>Community Builder</b>	<b>Education Coordinator</b>	<b>Member</b>
3	<ul style="list-style-type: none"> <li>• CB - collect names, maintain confirmations;</li> <li>• announce professions wanted that have(n't) registered announce challenge stats</li> </ul>	Follow up After the Event	<ul style="list-style-type: none"> <li>• send out more invitations;</li> <li>• first round of follow-up calls</li> <li>• REGISTER confirmed visitor(s); update list</li> </ul>
2	<ul style="list-style-type: none"> <li>• Pre-assign Members to pre-meeting networking areas</li> <li>• Pre-assign Members to Visitor Orientation rooms / areas:</li> <li>• 1 - Membership Committee</li> <li>• 2 - Keynote, VP, members who can close</li> <li>• 3 - members who can find out more</li> </ul>	Importance of Engaging the visitors	<ul style="list-style-type: none"> <li>• send out more invitations</li> <li>• second round of follow-up calls</li> <li>• Update confirmation list; REGISTER confirmed visitor(s)</li> </ul>
1	<ul style="list-style-type: none"> <li>• Review modified agenda with President, Vice-President, Keynote Speaker and Visitor Host Coordinator</li> <li>• ensure bio and pic is obtained for slide deck</li> <li>• VH Coord - ensure all Visitors are Registered</li> <li>• VISITOR HOST TEAM - call all Registrants to confirm attendance</li> </ul>	Why do a One-to-One with a visitor	<ul style="list-style-type: none"> <li>• Plan your morning:</li> <li>• Review registered Visitors list – find appropriate members to network with</li> <li>• Arrive 30 minutes EARLY</li> </ul>
0	VISITORS DAY - TWO HOURS		<ul style="list-style-type: none"> <li>• Network with your Visitors</li> <li>• Find potential referral sources for your Visitors to network with</li> <li>• Thank your Visitors for attending</li> <li>• Guide Visitor questions to Membership Committee</li> </ul>



# Visitors Day Meeting Checklist

Visitor Host Team, this is your time to shine. You are the first to arrive and the last to leave. A well-coordinated registration and orientation shows Visitors they are valued and gives a lasting impression.

## Before the Meeting

- Call (not just email) all the registered Visitors to confirm their attendance and provide them with details around location and cost. Ask if they'd like to bring someone!
- Ensure you have all the required supplies
  - Chapter roster, trade sheet printed for each Visitor
  - Level of Interest form for each Visitor
  - Visitor sign-in sheet, pens, name tags
  - Chapter business card for each Visitor
  - Branding and signage – tablecloth, roll-up banners, sandwich boards
  - Merchant device (if using), cash float, receipts to collect payment
- Role assignments
  - know who is taking on which roles
  - recruit extra members to assist

## Visitor Registration

The Visitor Host Team arrives early to setup the meeting room and the Visitor Registration Table. The Registration Table needs to move at a good pace, so ensure you have enough VH Team members at the table:

- Fill out sign-in sheet
- Accept payment and provide receipt
- Provide Name-Badge label, Level of Interest card, Trade Sheet
- Greeter(s) to take Visitors into the meeting room for networking

To each congestion, is recommended to have a different table for Member sign-in and badge pickup.

## Modified Agenda

This is a special meeting, geared specifically to show our Visitors the benefits of membership, with a strong call to action for applying. The Feature Presenter will focus their presentation around those benefits. All other elements of the Agenda should do the same. If you have less than 20 Visitors in attendance, you can follow the original 20-point Agenda. For a larger turnout, a modified Agenda has been provided to facilitate flow. It is provided further in the Playbook and contains elements of the agenda that can be excluded and/or amended.

The President opens the meeting by setting the expectations for the Visitors and Members, with the focus being on showing how Visitors can become part of the Chapter.

## Visitor Orientation

Visitors will have been given a Level of Interest card. They will fill out their contact details, as well as indicating their level of interest with a 1, 2 or 3. During Visitor Orientation, Visitors will break into these three groups. Select members will have been pre-assigned to these groups to facilitate the Orientation:

- 1 – ready to apply: Membership Committee members
- 2 – interested with questions: Feature Presenter, Vice-President, members who can close
- 3 – BNI not for me right now (with Subs, Guests): Members who can network and ask questions

During Visitor Orientation, remember to collect their forms. If not fully complete, ensure that their name and level of interest are indicated.

Follow the Visitor Orientation materials to conduct an effective session. Keep it about answering questions and moving Visitors closer to the application process. Be enthusiastic but don't over-talk or over-sell. Let the buying tension work its magic.

The remaining members stay in the main room and continue the meeting Agenda with Announcements and door prizes.

If possible, wait for Visitor Orientation to end before closing the meeting with a quote. If not possible, ensure members stay to network with the Visitors when they do come back.

**PLAYBOOK NOTES: VISITORS DAY CHECKLIST**

<b>Visitor Host Assignments</b>		
<b>Member Name</b>	<b>Role</b>	
	Day-before call	
	Registration table	
	Greeter	
	Post-meeting follow-up call	
<b>Visitor Host Supplies</b>		
<b>Visitor Orientation</b>		
Team 1's		
Team 2's		
Team 3's		

## 3. POST-VISITORS DAY FOLLOWUP

A successful Visitors Day is measured not by the number of Visitors that attended, but by the number of applications submitted. This is the time for following up with your Visitors.

### Follow Up with Visitors

Each Visitor was given a Level of Interest card when they signed in at the Registration table. These would have been collected during the Visitor Orientation and given to the Visitor Host Coordinator. The VH Coordinator will let members know who and when to follow-up.

In general, members should follow up with their own Visitors. The Visitor Host Team and the Membership Committee will also follow up according to the Visitor's level of interest.

### Housekeeping Items

Winding down a Visitors Day is no different than any other meeting. The Visitor Host Coordinator marks Visitor attendance in BNIConnect the same day, so the Vice-President can submit the PALMS within 48 hours of the meeting. If there were any Visitors that attended that were not previously registered, the Visitor Host Coordinator will have to input all of them before the VP can submit the PALMS. The Secretary-Treasurer needs to reconcile any cash collection and disbursement of funds.

Over the next two or three weeks, the Membership Committee will be busy with application interviews. Once they are all complete, THEN the Community Builder can announce the winners of your Visitors Day Challenge! It is also an opportunity to restate what your goals were for the Visitors Day, and whether you met them. Reporting back goals and actuals is a reminder to your members that their participation has an impact on the growth of the chapter.

## PLAYBOOK NOTES: VISITOR DAY FOLLOW-UP

Members	Follow up with your Visitors and thank them for attending Ask if there is anyone they would like to connect with Guide to Membership Committee members if they have questions about applying	
Members	Reach out to your Registered Visitors who did not attend, and invite them to next week's meeting	
Membership Committee	Follow up with Level of Interest 1 within <b>24</b> hours. If they haven't already applied, help them get started.	
Membership Committee	Follow up with Level of Interest 2 within <b>48</b> hours. Answer questions and convert to applicant.	
VH Team	Follow up with Level of Interest 3 within <b>48</b> hours – thank them for attending, ask if they know anyone in their profession who may be interested in visiting your chapter.	

# Visitors Day Summary Checklist

Pg	Pre-Planning
6	Confirm Date
	Confirm Feature Presenter
	Confirm Visitor Day Organizing Team Schedule meeting with planning committee (including Feature Speaker for one-week prior to Visitors Day)
10	Goals
	Expectations
	Rewards
	Consequences
11	Venue location and capacity Set catering expectations with Venue
	Confirm Visitor Fee
12	Marketing Plan
	Postcard designed and printed
	Phone call scripts for follow up after mailer goes out
	Email scripts for registered Visitors
	Phone / email scripts for post meeting follow-up
	Branded Supplies
14	Confirm Budget
	<b>Weekly Chapter Activities</b>
16	8-week plan for: Community Builder
	8-week plan for: Education Coordinator
	8-week plan for: All Members
	<b>Week Before</b>
	Confirm headcount with Venue for seating and catering
18	Call all registered visitors day before
	Meet with LET, Feature Speaker, VH Coordinator for final Agenda planning

<b>Pg</b>	<b>Day of Event</b>
	Chapter Roster / Trade sheet / Newsletter for each visitor ** Level of Interest Form for each Visitor ** Chapter Business Card for each visitor Registered Visitor check-in sheet Receipts for Visitor payment Visitor name tags Pens, markers Branded supplies – tablecloth, banners, sandwich boards Merchant payment processing device Visitor Host Team Role assignments
	<b>Follow-Up</b>
21	Input unregistered Visitors into BNIConnect Mark Visitor Attendance Recognize winners of any Challenge (after applications submitted and accepted/declined)
22	Visitor Follow-up phone calls
	<b>Collateral Materials (found on Visitors Day Resource Page)</b>
	Modified Agenda
	Sample postcard mailer
	Sample script – Invitation phone call
	Sample script – Follow up phone call
	Sample script – email to registered visitors
	Sample script – email reminder to registered visitors
	8-week summary plan for Members
	Personal Prospect list – planner for Members
	Contact Sphere Worksheet – planner for Members
	Visitors Day pathways graphic
	Social Media materials

# Additional Space for Notes



