



Member Success Program
Workbook

Our Core Values



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 that leads to meaning and happiness.



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



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.

2 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©**



PODCAST

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



BOOK

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



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.

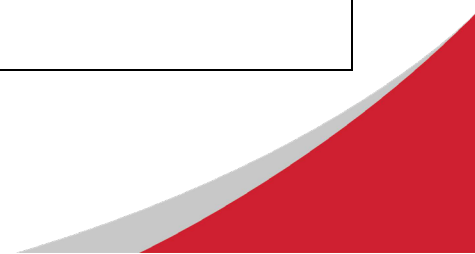
Skills

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.



Biography Sheet

Name:	Company Name:
Location:	
Profession:	Years in the Business:
Previous Types of Jobs:	
Spouse/Partner:	
Children:	
Pets:	
City of Residence:	Years in the City:
Hobbies/activities/interests:	
Burning desire:	
Something no one knows about you:	
Key to success:	





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 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 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 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:**

7-MINUTE GUIDE TO PERFECT WEEKLY PRESENTATIONS



Your customers receive more than 10,000 marketing messages a day, they ignore 99% of them. As a BNI Member, **we'll help you craft a message that breaks through**, gets heard and attracts customers so you can grow your business.



You'll learn the language that sells without looking salesy or feeling pushy. Once you've mastered these easy steps, you'll be able to tailor all of your marketing material to make it **more effective**. And, **your message will begin to spread throughout your network** (both within and outside of BNI).

This fast and quick framework was created by teaching millions of business owners around the world how to tell their business story. Once you learn the system, **use it to create your winning message and practice delivering it**, you'll be able to:



Deliver powerful weekly presentations to your BNI Chapter.



Update your website and online marketing materials to tailor your unique message.



Make all of the marketing and advertising you create more effective.



Generate more referrals within BNI and word-of-mouth marketing outside of it.



Transform people you meet into active members of your referral network in 60 seconds or less.

3-SIMPLE STEPS TO GROW YOUR BUSINESS BY ATTRACTING THE CUSTOMERS YOU DESERVE

STEP 1

🕒 2-minutes

DESCRIBE YOUR BEST TARGET CUSTOMER

Many new marketers fail because they never define a target customer. Instead, they use words like, "everybody" or "anybody". Defining a target market is not limiting - rather it gives referral partners a mental picture of the best customer to refer to you.

1

Think of a person or company who is already a ideal customer for you.

2

What neighborhood do they live in?

3

What is their family status and profession?

4

How does their household income compare with the average?

5

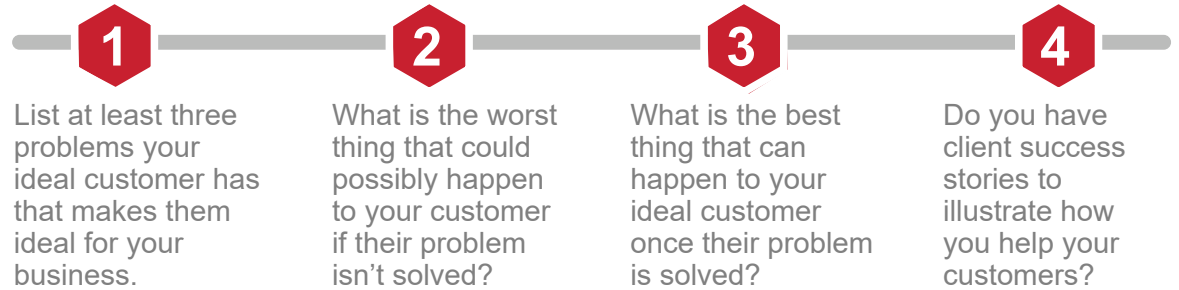
What are they planning, bragging about or complaining about?

STEP 2

 2-minutes

WHAT ARE THE PROBLEMS YOU SOLVE FOR YOUR TARGET CUSTOMER

All businesses exist to solve a problem. Too many business owners talk about their products and services. This sounds self-serving and it pushes people away. Instead, **talking about the problems you solve makes you into a giver who attracts customers.**



STEP 3

 3-minutes

BUILD YOUR PRESENTATION

5 Elements of the perfect business introduction



REFINE INTO A WEEKLY PRESENTATION

The business owner with the clear message is the one who attracts the most customers. Too many marketers complicate their message by talking too much about themselves. **We help you focus on the few simple elements** to create a powerful marketing message - the problems you solve for your customers.

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

FOR MORE INFORMATION:

VIDEO

 Member Success Program – **Weekly Presentation**

(Includes additional methods for creating weekly presentations to help you keep your message fresh so you don't get lost in the noise.)

BOOK

The 29% Solution: 52 Weekly Networking Success Strategies by Dr. Ivan Misner

www.bni.com

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.





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



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