



Member Success Program
Workbook





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 4 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,” **wasting 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-One’s 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 give you an opportunity to prepare to make the time together even more powerful.

3

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 their 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 that's 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©**



BOOK

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



PODCAST

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



GAINS Exchange®

Goals

Accomplishments

Interests

Networks

Skills





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, you increase the number of 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 1 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 2 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 make a commitment 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 3 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 business people 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"/> Travel Agent <input type="checkbox"/> Caterer <input type="checkbox"/> Event Planner	<input type="checkbox"/> Digital Marketing <input type="checkbox"/> Graphic Designer <input type="checkbox"/> Marketing Services <input type="checkbox"/> Promotional Items	<input type="checkbox"/> Financial Advisor <input type="checkbox"/> Accounting Svs <input type="checkbox"/> Banking Services <input type="checkbox"/> IT Services	<input type="checkbox"/> Residential Agent <input type="checkbox"/> Mortgages <input type="checkbox"/> P&C Insurance <input type="checkbox"/> Cleaning Service	<input type="checkbox"/> Builder <input type="checkbox"/> HVAC <input type="checkbox"/> Painter <input type="checkbox"/> Electrician	<input type="checkbox"/> Chiropractor <input type="checkbox"/> Massage Therapist <input type="checkbox"/> General Dentist <input type="checkbox"/> Supplements
CORE SUB CATEGORIES	<input type="checkbox"/> Gifts <input type="checkbox"/> Florist <input type="checkbox"/> Event Venue <input type="checkbox"/> Baker	<input type="checkbox"/> Printer <input type="checkbox"/> Sign Company <input type="checkbox"/> Media Services <input type="checkbox"/> Print Advertising	<input type="checkbox"/> Commercial Ins <input type="checkbox"/> Business Law <input type="checkbox"/> Telecom <input type="checkbox"/> Health Insurance	<input type="checkbox"/> Security Systems <input type="checkbox"/> Real Estate Law <input type="checkbox"/> Title Services <input type="checkbox"/> Inspector	<input type="checkbox"/> Plumbing <input type="checkbox"/> Interior Decorator <input type="checkbox"/> Landscape Svcs <input type="checkbox"/> Flooring	<input type="checkbox"/> Alt Wellness <input type="checkbox"/> Cosmetic/Skin care <input type="checkbox"/> Fine Jewelry <input type="checkbox"/> Supplemental Ins.
ADDITIONAL CATEGORIES	<input type="checkbox"/> Wine Merchant <input type="checkbox"/> Event Marketer <input type="checkbox"/> DJ/Musician <input type="checkbox"/> Hotel/ Restaurant	<input type="checkbox"/> Copywriter <input type="checkbox"/> Videographer <input type="checkbox"/> Radio Advertising <input type="checkbox"/> Embroidery	<input type="checkbox"/> Credit Card <input type="checkbox"/> Business Advisor <input type="checkbox"/> Office Machines <input type="checkbox"/> Employment	<input type="checkbox"/> Property Mgmt <input type="checkbox"/> Pest Control <input type="checkbox"/> Carpet Cleaning <input type="checkbox"/> Moving Company	<input type="checkbox"/> Roofing & Gutters <input type="checkbox"/> Renovations <input type="checkbox"/> Building Materials <input type="checkbox"/> Windows/Doors	<input type="checkbox"/> Clothing/Accessory <input type="checkbox"/> Personal Trainer <input type="checkbox"/> Eye Care <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 that 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.

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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:**
Power of One - Visitors®

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



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?

