



Member Mentor #1: Roles, Agenda, Expectations & Weekly Commitment

President or Past President

During the One-to-One with a new Member, the President must lead the conversation. Many new Members don't know what they don't know. They are not sure what is important. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Overview of the Leadership Team Roles

- President – Facilitates the meeting
- Vice President – Oversees the Membership Committee
- Secretary/Treasurer – Manages Room Fees as well as collects BNI® membership dues
- Membership Committee – Supports BNI® policies; interviews applicants; reviews participation
- Education Coordinator – Educates Members weekly
- Mentor Coordinator – Supports New Members
- Visitor Host Team – Greets and supports the visitors
- Chapter Marketing Team – Membership Committee Community Builder Specialist, Communications and Events Coordinators

Let the new Member know that all Members are expected to take roles of leadership sometime during their membership.

BNI Weekly Chapter Meeting Agenda

Review the BNI® Weekly Chapter Meeting Agenda. Ask the new member if they have any questions about the agenda or how the meeting is run.

Explain proper participation during the agenda, such as how to effectively contribute to a weekly presentation and during the referrals and testimonials portion of the agenda. The weekly presentation is a time to educate the room on what you do and about you; the referrals and testimonials portion of the meeting is a time to share about a referral you're giving or have given or for a testimonial. This is not a time to share that you had a one-to-one with someone or that you have closed business. This is all about others in the room, not about yourself, which is done in the weekly presentations section.

Expectations & Weekly Commitment

Review basic expectations of BNI® membership, including being on time for the meeting and to One-to-Ones. Each week you are expected to give something during the Referrals & Testimonials portion of the meeting. It is always easy to do one of the following three things:

- I have a referral for ...
- I have brought a visitor ...
- I have a testimonial for ...

Share that Members are encouraged to only share one Referral or one Testimonial during this time in the BNI Weekly Chapter Meeting Agenda. Save additional Referrals and Testimonials for the weeks you might need them.

Sign the Passport once this section is completed.



Member Mentor #2: Rules of the Game (Policies), PALMS Report, Traffic Lights/Power of One Report, GP101 & Reporting2You Reports

Vice President or Trained Membership Committee Member

During the One-to-One with a new Member, the Vice President must lead the conversation. Many new members don't know what they don't know. They are not sure what is important. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Rules of the Game (BNI® Policies)

Bring a copy of the BNI® Member Policies before your scheduled One-to-One. Review the policies yourself to make sure you understand them. Ask the new member to review the policies before your meeting.

- Every member must have a clear understanding of the BNI® System. Ask them if there are any policies that they have questions about or need more information.
- The following policies are very important to help the new Member understand:
 - o General Policy #3 & #5: Attendance
 - o General Policy #6: Expected to be engaged and bring qualified referrals and visitors
 - o Chapter Vision & Mission, Goals and Mechanisms

PALMS Report

Bring a recent PALMS Report to share with the new Member. Describe how a BNI® Chapter acts like a business to produce results for its Members. In doing so, we track our activity weekly using BNI Connect®. Share recent chapter statistics using the GP101 Report. Describe the definition of PALMS:

P: Present A: Absent L: Late/Leave Early M: Managed Leave S: Substitute

Member Traffic Lights / Power of One

Help the new Member understand the expectations in addition to attending the weekly meeting:

- Conduct at least 1 One-to-One weekly
- At least 1 CEU's weekly
- Pass at least 1 Referrals weekly
- Bring at least 1 visitor monthly
- Report TYFCB (Thank You For Closed Business)

Passing referrals may not be possible for new Members immediately. Referrals are based on relationships, and since they are new to the Chapter, this must be given time. For a new Member, it will be easy to do at least 1 One-to-One weekly using the Passport to Success meeting with the Member Mentors. Encourage them to focus on getting all 10 Passport One-to-Ones done before any other Chapter Members. Help them know how to become GREEN!

Bringing Visitors and Guests to the meeting by simply inviting their contacts adds value to the Chapter. Being at the meeting weekly is critical to their membership.

Sign the Passport once this section is completed.



Member Mentor #3: Biography Sheet, Speaker Rotation, Room Fees & Membership Renewal

Secretary/Treasurer or Past Secretary/Treasurer

This is the opportunity to build a relationship and support the new Member. The new Members will not know what questions to ask of you, so you need to lead the conversation and help them to know what is expected of them. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Biography Sheet

Every new Member can complete the Biography Sheet in their BNI Connect® profile. This document can be printed and submitted to your Secretary/Treasurer before your Feature Presentation. Every Member has the opportunity to deliver a Feature Presentation, allowing them to teach their fellow members how to find referrals for them. The Biography Sheet is used to introduce Members just before they present. Here are a few tips on using your Biography Sheet.

- Keep it positive
- Educate the room to build your credibility.
- When disclosing something no one knows about you, make sure that it builds your image, not something embarrassing.

Speaker Rotation

Remind the new Member that attendance at the Member Success Program and completion of the Passport to Success Program are necessary before being a Featured Speaker. Register them to attend an in-person Member Success Program.

Room Fees

Explain the process of collecting Chapter Meeting Fees.

Membership Renewal Payments

- The Membership Renewal process begins with a participation review at 7 months.
- BNI membership dues are due 15 days before the due date
- Renewals are not automatic; they are at the discretion of the Membership Committee

Sign the Passport once this section is completed.



Member Mentor #4: Attendance & Substitutes

Trained Membership Committee Member

New Members need to understand two areas of success early in their membership: the Attendance Policy and the Substitute Program. This will be the primary topic of your One-to-One with the new Member. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

BNI General Policy #5: Attendance

Every new Member must understand the Attendance Policy. A member may not miss more than three meetings in a rolling six-month period. Lates and Leave Early count as ½ an absence. Upon their fourth absence, their classification will be opened. Upon the few occasions you are unable to be at the meeting, the Substitute Program is available.

Substitute Program

Members that send substitutes on a more than “once in a while basis” actually hurt their credibility and negatively impact their ability to give and receive referrals. Each Member is accepted for membership, and your fellow Members are building relationships with you, not your substitute.

Members are allowed to have up to 3 Substitutes in a rolling 6-Month period. A qualified substitute attends the full meeting in the event a Member cannot make a meeting. Also, in alignment with the policy around a Visitor visiting twice (#7). **Substitutes are expected to be coordinated by the member not present before** the meeting. Abuse of the Substitute Program is managed by the Chapter’s Membership Committee. Members who abuse the substitute system show a lack of commitment to the Chapter, which puts them in conflict with the BNI® Code of Ethics.

In case of problems with a member, Membership Committees may, at their sole discretion, put a Member on probation relating to the Member’s business practices or commitment to the Chapter. *NOTE: Actions taken by a Membership Committee need to be consistent across ALL members. Probationary action decisions should involve an Area Director.*

Assist the new Member in identifying qualified substitutes. Encourage the new Member to invite their substitutes to the meeting before needing them as a substitute. Making the substitute feel comfortable with BNI® System and meeting process in advance will increase the likelihood that a substitute will show up when needed.

Participation Reviews

To support Members in assessing their success in the BNI® Success System, the Power of One / Member Traffic Lights Report provides ongoing self-assessment of each Member’s engagement in the BNI® Success System.

Also, each year, 5 months before renewal, the Membership Committee Participation and Renewal Chair conducts a Participation Review to support Members in reaching the Chapter’s goals as well as their referral and Thank You For Closed Business goals.

Sign the Passport once this section is completed.



Member Mentor #5: Referrals vs. Leads, Chapter Education Units

Education Coordinator

Being a new Member is overwhelming as they try to learn how to participate most productively. One thing that is very confusing for a new Member is the difference between referrals and leads. As the Education Coordinator, you play a key role in the education of the chapter Members. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Leads

A lead involves two people: you and the person you are giving the lead to. There is no time spent speaking to the third person, qualifying that the person needs the product or service, and promoting the Member who can provide that product or service.

Example of a Lead – You walk into a neighbor’s house and notice that they have a spot on their carpet. When you go back to your Chapter, you tell the carpet cleaner that your neighbor needs to have their carpets cleaned. But you never spoke to the neighbor to find out if they wanted to talk to a carpet cleaner.

Referrals

A referral involves three people: you, the person being referred, and the person who is receiving the referral.

Example of a Referral – You walk into a neighbor’s house and notice that they have a spot on their carpet. You open the conversation and ask what happened. They tell you what happened, and you promote the carpet cleaner (in your Chapter) and ask them if they would like to talk to him. They say “Yes.” Now you have a referral to pass to have the Carpet Cleaner call your neighbor.

Internal Referrals – These are the very first level of referrals that you will pass in the Chapter. These are the ones in which you do business with a fellow Member; they are passed internally. You are not required to do business with everyone who is in the Chapter, but it is encouraged whenever possible as a way of building trust.

External Referrals – This is similar to the example above. You bring a referral from outside the Chapter (from your network) to one of your fellow Members. These come with time when you have developed enough trust and knowledge with your fellow Members.

Chapter Education Units

Have you ever heard the phrase: “Learn More to Earn More”? There is a direct correlation between the networking education you complete and the revenue you generate from referrals. Chapter Education Units are the equivalent of one hour of learning time. Live Trainings, such as Member Success Program and the Advance Series, are also reported per hour. Report your Chapter Education Units in BNI Connect®. Each minute in BNI Business Builder® is tracked in your point total. Divide your point total for the week by 60 to determine the number of CEUs to report. Additionally, the Chapter has a library available to support CEUs. Make certain the new Member can navigate and use the BNI Business Builder® Platform, and enroll them in a couple of your favorite courses on the BNI Business Builder® App.

Sign the Passport once this section is completed.



Member Mentor #6: One-to-One Etiquette

A Member Who Hosts Quality One-to-Ones and Scores High on the Power of One Report

There are many steps to the referral process, and the very first of those steps is trust. It takes time to build trust, and new Members may become frustrated if they do not understand this fact. The quickest way to build trust with Members is to do quality One-to-Ones. Following are the steps to hosting One-to-One meetings with other Members. Be sure to have your GAINS Profile and other valuable One-to-One documents prepared to share with the new Member. Lead by example!

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

1. Encourage the new Member to ASK for One-to-Ones – don't be shy! Every Member was new at one time, and they understood that One-to-Ones are important for learning about each other.
2. Set a time, day, and location that works for both of you. One-to-Ones usually last about an hour. Be sure to honor each other's time.
3. Show up on time and be prepared.
4. This time is used to get to know your Referral Partner and HOW to refer them. This is not the time to do a sales pitch about your business.
5. In BNI Business Builder®, you can download a Biography Sheet and GAINS Exchange® to be used to learn more about the person with whom you are meeting. The acronym GAINS stands for Goals, Accomplishments, Interests, Networks, and Skills. Depending on the new Member's attendance at Member Success Program, this may be a new conversation for them or an overview of what was covered in the Member Success Program. Also, the GAINS Exchange® information can be documented in BNI Connect®. Advise the member that they should be sure to update their Member Biography Sheet and GAINS Profile® regularly.
6. Relax and enjoy getting to know one another. You will learn more about One-to-Ones and GAINS by attending the Member Success Program and the Advanced Member Success Series Hosting One-to-Ones.
7. Review how the new Member logs into BNI Connect® to record their One-to-Ones. Walk them through the process to record the One-to-One they are having with you right now.

Sign the Passport once this section is completed.



Member Mentor #7: Chapter Tools

A Member Who Effectively Uses BNI Connect® and Scores High on the Power of One Report

BNI® meetings can be very confusing to an observer and especially to a new Member. There are many tools used in BNI®, and with a little explanation, these tools can assist all members in achieving referral success. The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Assure the new Member has their BNI Connect® Username and Password and that you have online access to BNI Connect® available during this One-to-One. Active participation in accessing and setting up their BNI Connect® Profile, as well as visually seeing how to enter their activity in BNI Connect®, will engage them more with the online tools available to them.

Chapter Tools of the Trade - For items 2-5 below, see the BNI Connect® documents section to download the “BNI Slips Program Overview” and the “Thank You For Closed Business (TYFCB) document.

1. BNI Connect® Member Profile – Assist the member in accessing and setting up the BNI Connect® Member Profile.
2. Referrals Slips – Describe how they are completed online. During the Referrals & Testimonials portion of the meeting, Members share their contributions of Referrals & Testimonials only for the week.
3. Thank You for Closed Business Slips – The Thank You for Closed Business Program is how we track the money generated by Members using the BNI® Success System. Explain how the form is completed with the name of the Member who gave the referral and the value of the referral. The person whose name is on the Thank You for Closed Business Slip will get credit for generating business in the dollar amount listed. The person who received the dollar amount remains anonymous.
4. One-to-One Slips – This is submitted by either Member who attended the One-to-One after the One-to-One has been conducted. Only one Member needs to enter BNI Connect®, and if you attempt to log in again, the system will verify that this is an additional One-to-One.
5. Chapter Education Unit (CEU) Slips – BNI® provides a wide range of training for Members to learn the different tools to grow their business using the BNI® Success System. Share the regional Events Calendar and briefly explain the benefits of each workshop. Tell them that, after each training, they can submit a Chapter Education Unit Slip to indicate which training or workshop they attended. These CEUs would be in addition to CEUs earned through BNI Business Builder®.
6. Testimonials – When you have the opportunity to do business with a fellow member, and it goes well, you can give a testimonial. Put that testimonial in writing so members can use the testimonials on their BNI Connect® profile and for marketing purposes.

Note: All of these slips must be entered online in BNI Connect® or on the BNI Connect® Mobile app.

Sign the Passport once this section is completed.



Member Mentor #8: Gold Club Badge

Gold Club Badge Member or Ambassador

This should be a member who has sponsored six or more members into BNI® and has earned their Gold Club Badge. If you do not have a member who has sponsored at least six new members, choose a Member who invites more than 1 visitor per month.

As a new Member, it can take time to pass good referrals because they have not been in the Chapter long enough to establish credibility with other Members. As the Member Mentor on this topic, you can help them understand that they can have a significant impact on the chapter by bringing people to the meeting for other Members to meet.

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Inviting & Bringing People

The new Member has something that no one else in the Chapter has... their network of people. Introducing the Chapter to that network will have a positive impact on the entire chapter with increased referrals, increased membership, and increased awareness in the community.

Twice annually, our Chapter will host a **Business Open House or Visitor Event**. This is an exciting opportunity to introduce local business professionals to the power of Networking. Each Member is expected to bring at least 1 qualified visitor to each event.

Members must understand that everyone is welcome to visit the BNI® Chapter, even those people who could not or would not apply to the Chapter. Guests and visitors alike are welcome in the Chapter. If the guest isn't qualified to apply but would like to learn more about an opportunity in BNI®, you should connect them with the Community Builder Specialist in your Chapter - or our Region Chapter Placement Specialist.

Guests

People who cannot apply to the Chapter are known as guests. Guests add great value by carrying the BNI® story into their networks. Guests can refer visitors to the Chapter as well as do business with the Members.

Visitors

Professionals who come to the meeting and have the potential to apply to the Chapter because their classification is open are known as visitors. These are the people who could submit a membership application. These are the people who grow the Chapter.

Gold Club Badge

Describe to the mentee that a Gold Club Member has sponsored six or more Members into BNI® and receives a black "Gold Club Member" badge. Gold Club Badges are earned over time and with the persistence of regularly bringing visitors to the meeting. There is an honor and distinction given to Members who have earned this badge. We also have Gold Club designations at every +6 level as well.

Work with the new Member during this session on IDENTIFYING professionals in their network to balance the contact spheres in your chapter using the Contact Sphere Worksheet (found in the Resources section on BNI Business Builder®). Work with the new Member during this session on INVITING visitors to the meeting using GRIP.

Sign the Passport once this section is completed.



Member Mentor #9: Visitor Host Experience

Visitor Host Team Member

To help new Members understand the Givers Gain® value of BNI®, we ask that each new Member serve one day with the Visitor Host Team. This will teach the new Member that all Members are expected to serve on the Leadership Team in some capacity as a way of giving to the Chapter, and one of the best first steps is to serve as a Visitor Host for a day.

Assign a day for each new Member to support the Visitor Host team. During this session, advise the new Member and review what they will be doing during the meeting.

They will be:

- Greeting people as they enter the room
- Providing Visitor Name Badges to guests or visitors
- Taking visitors/guests into the room and introducing them to Members in their contact sphere
- They will also do a follow-up phone call that day to at least one visitor to find out what impressed them most about the meeting.

Day of the Meeting (in which the New Member will be supporting the Visitor Host Team)

Ask the new Member to arrive early and be the Visitor Host Greeter and help to introduce the visitors to the Leadership Team that day. Remind the new Member to leave the visitor with a Member, so they can come back to the Welcome Table and greet the next person who arrives.

At the end of the meeting, answer any questions the new Member may have.

Follow up with the new Member to find out if they did a follow-up call with an assigned visitor/guest.

Sign the Passport once this section is completed.



Member Mentor #10: Regional Trainings

A Member Who Regularly Attends Regional Trainings and Scores High on the Power of One Report

This should be a member who regularly attends Regional trainings to enhance their BNI® Member Experience and effectively grow their business using the power of education.

The BNI® content should only take 10-15 minutes to complete. The balance of the hour should be used to get to know one another and build a referral relationship.

Events Calendar

Review your Regional Events Calendar on BNITampa.com.

Show how to find and register for events at <http://BNITampa.com/en-US/events>.

Identify future Regional trainings that would benefit the new member, such as:

- Member Success Program
- Advanced Member Success Series (Referrals, One-to-Ones, Weekly Presentation, Featured Presentation, and Power Teams).
- Leadership Conference/Annual Summit
- March Best Ideas Conference
- BNI Connect® Webinars
- New Member Socials
- Speed Networking Events
- BNI® Tampa Professional Development Workshops

Discuss the importance of always investing in your personal and professional growth.

Sign the Passport once this section is completed.