



One to One Business/Strategy Meetings

Get to Know Your Team and Increase Your Referrals



Email your worksheets to the person you will meet with next. The worksheets included in this manual include the Member Bio Sheet, Contact Sphere Planning Worksheet, GAINS Worksheet and Last 10 Customers Worksheet.



12 Week

One-on-One Business/Strategy Meeting

Schedule

	Date/Time	BNI Member	Topic/Focus of Conversation
Week 1			
Week 2			
Week 3			
Week 4			
Week 5			
Week 6			
Week 7			
Week 8			
Week 9			
Week 10			
Week 11			
Week 12			

BE SYSTEMATIC AND INCREASE YOUR REFERRALS!

You are more likely to refer business to people whom you know, like and trust. By systematically scheduling a One-on-One Business/Strategy Meeting with another member of your chapter each week you will have the opportunity to deepen those professional relationships and further educate your team on what constitutes a good referral for you.

Use this worksheet to reference who you have met with outside of your regularly scheduled BNI meeting and the focus of that conversation.

BNI[®] Member BIO Sheet

BUSINESS INFORMATION

Name: _____ Business Name: _____

Profession: _____

Location: _____ Years in Business: _____

Previous Types of Jobs: _____

PERSONAL INFORMATION

Family Information:

a. Spouse: _____

b. Children: _____

c. Animals: _____

Hobbies: _____

Activities of Interest: _____

City of Residence: _____ How long? _____

MISCELLANEOUS INFORMATION

My burning desire is to: _____

Something no one knows about me: _____

Keys to success: _____



GAINS Profile Worksheet

Use this form to record GAINS for BNI members 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.



Contact Sphere Worksheet

Contact Spheres are businesses or professions that naturally provide a source of referrals for one another. They are in somewhat related but noncompetitive businesses. Businesses in a Contact Sphere have a symbiotic relationship in that they support and enhance one another.

YOUR CONTACT SPHERE

Your Profession/Business

Related Professions:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____

What 3 professions would help you round out your Contact Sphere?

- 1. _____
- 2. _____
- 3. _____

Make a commitment to your BNI business partner to help fill their Contact Sphere by inviting people to BNI from their "Top Three Most Wanted" list above.



Best Customer Worksheet

Imagine how you can increase the referrals you receive by helping your BNI business partner understand how to find more customers like the ones below!

1. List your last 10 customers below.
2. Circle the ones that are the BEST example of a good referral for you.
3. Write your answers to the following questions in the space to the right of the customer.

Where did these customers come from? Were they referred to you? What did you do for these customers? What makes them an ideal referral? Why are the others not ideal?

1	_____	_____
2	_____	_____
3	_____	_____
4	_____	_____
5	_____	_____
6	_____	_____
7	_____	_____
8	_____	_____
9	_____	_____
10	_____	_____



Commit to take action!

The success of the One-on-One Business/Strategy Meeting depends on how well you follow through with the actions you have agreed to take.

Top 5 Most Wanted Personal Introductions:

Name:

Company Name:

Why?

Select one personal introduction that your BNI business partner can help you with in the next week:

Identify one long-term goal/referral that your BNI business partner can help you achieve: _____

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What action steps need to be taken to make this long-term goal/referral a reality? _____

By when? _____

Date of follow up One-on-One Business/Strategy Meeting? _____



Let's review the system!

It's as simple as scheduling one Business/Strategy Meeting each week with one of your BNI members.

Set Time and Date

- Restaurant
- Someone's Office (preferred)

Pick a time to meet. It's better if you meet at someone's office because you can learn more about their business that way.

Prepare Your Worksheets

- Member Bio Sheet
- GAINS Profile
- Contact Sphere Worksheet
- Last 10 Customers Worksheet

Take the time to prepare your worksheets in advance of your One-on-One Business/Strategy Meeting. The worksheets will help you share important information with your business partner about your business and how to find referrals for you.

Exchange Info Before the Meeting

Fax or email your four worksheets to your business partner before the meeting. Agree on a simple agenda for the meeting to honor their time commitment.

Bring Worksheets to One-on-One

Bring the same materials to the One-on-One that you faxed or emailed earlier. You should also bring other materials that could help you help each other. For example, you could also bring testimonials from satisfied customers, or brochures that your business partner could display on your behalf, or at a higher level, your Rolodex to share.

Meet with Your Business Partner

Meet with your BNI business partner and learn as much about how to find referrals for them as possible. Use the worksheets as a foundation to build upon.

Commit and Agree on Goals

- One short-term referral
- One long-term referral
- Invite prospects from your partner's Contact Sphere Top 3 list
- Schedule a follow up meeting (possibly at the other person's place of business)

Make a commitment to help your BNI business partner with referrals, both short-term and long-term. At the same time, invite prospective BNI members from your partner's Contact Sphere Top 3 list to help them build their network through BNI and their Contact Sphere. If you met at someone's office plan to meet at the other person's office the next time.