

# **BNI Embarcadero New Member Orientation Package**

**Welcome to the Embarcadero Chapter of BNI! On behalf of the group, I want you to know how excited we are that you joined. This information packet will help you get as much out of the group as possible.**

BNI headquarters sponsors a Member Success Training Program that covers basic information, such as how to get the most out of your 30-second infomercial, and how to give quality referrals. All new members are required to attend the Member Success Training at their earliest convenience. You will be advised of specific dates by email. The training takes place at the BNI Bay Area Director's office at 2645 Ocean Ave., #202, San Francisco, CA 94132 – near City College of San Francisco. Trainings take place generally on the 3<sup>rd</sup> Tuesdays.

**This packet is customized for the Embarcadero Chapter, and covers practices specific to our group. Since many of these practices aren't listed in other BNI information, we want to make sure you know what to expect, as a new member, to alleviate any confusion and make you feel as welcome as possible.**

If you have questions about meeting practices not covered in this packet, or think of other resources that would be helpful to you as a new member, please let me know. Your input is extremely valuable in our continuing efforts to improve our chapter.

## **The Mentor Program**

Upon joining, each new member will be assigned a mentor who will be available to answer any questions you might have and help you develop the tools needed for success within BNI. The mentor will help introduce you to others in the group and help you identify power partners, or those members who might be your strongest referral source.

## **Attendance**

Attendance is one of the most important indicators of a successful chapter is taken very seriously. When members are present, more referrals are passed; when members are absent, the group suffers.

If you cannot attend a meeting, you should arrange for a substitute to take your place and you will not incur an absence. A sub can be a member from another chapter, a work associate, a client, or someone whom you feel can appropriately represent you at the group.

Each member is allowed three (3) absences per six-month term, but please use these absences sparingly. After 3 absences, your membership is at risk of being revoked. By having a substitute you avoid incurring an absence. This data is tracked by the Vice President in the VP Report.

Please also be on time for meetings. Each week's meeting starts promptly at 7:30. You are strongly encouraged to arrive 15 minutes early in order to spend time visiting and networking before the meeting and enjoy breakfast. If you arrive after the meeting has started, or leave before the meeting has officially ended, you will incur half an absence.

## **The Referral Process**

Referrals are the core of the meeting, and the reason we all get together every week. Referral slips are placed in the back of the business card holder boxes that are passed around during the beginning of the meeting. It's a good idea to take a few referral slips when they go by. Even if you don't think you have any referrals, you may think of some during the course of the meeting or during the week.

Fill out as much of the slip as you can, and don't forget to circle how "hot" the referral is (on the "thermometer" scale to the right, from 1 to 5). This information is very useful when the recipient of the referral pursues the lead. After you've written the referral, separate the sheets -- when it's your turn to give referrals, hand the white copy to the person receiving the referral, the pink copy to the basket, and keep the yellow copy for yourself.

A few hints to make the most of referrals: During the meeting, spend a few minutes giving some background on the referral to the person receiving it. Let the referral know that you gave out his or her name, and he or she should expect a call from the person who received the referral. The more involved you can be in the process, the better chance of making a connection between the person receiving the referral and the business prospect in question. The referrals and testimonials are timed at 25 seconds.

## **Your Weekly 30-Second Infomercial**

Each week, you have the opportunity to talk about your business for 30 seconds. This is an opportunity to introduce yourself, identify your business niche, and point out what constitutes a good referral for you.

The Member Success Training Program will train you how to use this time most effectively. Here are a few pointers to make the most of your 30 seconds:

- Introduce yourself and your business
- Tell what your company does and how your clients benefit from your product/service
- Ask for a specific type of referral, i.e. an oral surgeon or a hotel owner, etc., instead of "everybody" is a good referral
- Use a "memory hook" (a catchy one liner for people to remember. Listen to current members for some good examples.)

To keep the meeting running on time, listen for the timer, so you'll know when your 30 seconds are up. When you hear the timer, wrap it up and sit down.

## **Your Seven-Minute Presentation**

Each week, three people will have the opportunity to provide a seven-minute overview of their business. This is a great opportunity to tell the group more about your business, as well as the perfect client you are looking for. Make sure you know when you are speaking, so you are prepared. Each week, the Secretary/Treasurer will read the Speakers Schedule for the upcoming weeks. The Secretary/Treasurer also distributes an updated speakers' list, regularly. Take note of when you're speaking, and rehearse carefully for using the precious few moments of presenting time. You need to have taken the MSP (Membership Success Program) in order to qualify for making your first presentation.

It is also the speaker's responsibility to reschedule if they can't speak on the appointed date. After you've found someone to switch with, let the Secretary/Treasurer know about the change so he/she can update the schedule.

The 7-minute presentation consists of 5 minutes to present your talk, plus 2 minutes for questions and answers. Some possible ideas for your presentation include: A short history on yourself; how you got involved in your current business; examples of successful clients; challenges that you've overcome; and a description of what a good referral is for you. MOST IMPORTANTLY, BE PREPARED!

### **Door Prizes**

The speakers are responsible for bringing a small door prize, usually valued between \$10 and \$20. Ideally, the door prize should have something to do with your profession. Another suggestion is to offer to take the winner out to lunch. The winner of the door prize is drawn from the pink slips of passed referrals at the end of the meeting, so bringing a good prize is an incentive for people to pass more referrals in order to increase their chances of winning.

### **Guests**

Guests are one of the most important aspects of BNI. Guests allow us to grow membership and keep the chapter vibrant. Members are encouraged to bring one or more guests per month. Please remember that a guest may visit either as a visitor or substitute only twice in a six-month term.

### **Ideas for Bringing Guests**

Potential guests are everywhere, so don't feel limited to just bringing clients. Guests can be the service people down the street, the supplier for your business, or your best client.

Another idea is to focus on bringing the types of guests who would be helpful to your business. Companies that target the same clients as you, but are not competitors, work well together in the group. For example, a mortgage broker might invite a real estate agent, or a printer might invite a graphic designer. Friends or social acquaintances are also good sources of possible guests.

### **Guest Fees**

Guests are charged \$15.00 each week for breakfast. You can choose to pay for your guest or not — whatever seems appropriate to you. If you are paying for your guest, don't forget to give \$15 to the Secretary/Treasurer at the beginning of the meeting.

### **One-on-One Meetings & Trios**

An integral part of the success of BNI is the personal connections we form as members, in order to get to know one another and to learn more about our businesses. We encourage you to meet with other members outside of the weekly meetings to get to know more about each other on a one-on-one basis, or in a trio with two other members. These meetings are called "dance cards." This can be done easily over tea or coffee, lunch, or any other appropriate opportunity that allows you to talk about your business.

We also have other social events as an entire chapter approximately once per month as another means to get to know your fellow BNI members.

### **Go For the Gold Booklet**

To encourage members to meet outside of the group, we all participate in the “Go for the Gold” program. Each week a book will be passed around in the meeting that tracks which members met outside of the group that week. The person who has the most “dance cards” or one-on-one meetings outside our meeting during a month will have his/her monthly dues (valued at \$55) waived for one month. The Go for the Gold Chair People keep track and announce the winner during the following month.

### **The Leadership Team**

The Leadership team is responsible for running the weekly meetings and taking care of the administrative business of the chapter. Every six months a new leadership team is selected. Below is a brief description of each position on the leadership team. You can find the current leadership team and their contact information in the chapter roster in the printed version or online.

**President** – Responsibilities include running the meeting and generally running the chapter with the help of the Leadership Team. Incoming presidents are selected by outgoing presidents and approved by the group. The incoming president is responsible for choosing the Leadership Team.

**Vice President** — Keeps track of chapter statistics, including attendance, referrals given and received, plus the amount of business generated through referrals. Each month, the VP gives a report on generated business and hands out awards for most referrals given, most guests invited and the Go for the Gold Award.

**Secretary/Treasurer** — Collects and deposits monthly dues and guest fees. He/she is also responsible for updating the speakers’ list and distributing it to the group. If you have questions about when you are speaking, or have switched speaking dates, make sure to inform the Secretary/Treasurer.

**Education Coordinator** — Presents information on improving networking skills and other topics.

**Membership Committee Chair** — Responsible for member growth, retention and processing applications by checking references. Works with Mentor Motivator to pair new members with mentors.

**Visitor Hosts** — Welcome new visitors and provide information on joining the group to interested guests.

**Timekeeper** — Times the 30-second infomercials, the 7-minute presentations, and the 25-second referral/testimonials to keep the meeting moving forward.

### **BNI Embarcadero Fees**

1. \$100 — One-Time Registration Fee Submitted With Application.
2. \$330 — Annual Dues (12 months).  
Anyone joining on or before the 15th of the month is paying for that month.  
Anyone who joins after the 15th is paying for the next month.
3. \$510 — Bi-Annual Dues (24 months).
4. \$55/month — Chapter Breakfast Fees.
5. \$15 Per Visit For Guests.