

MEMBER VISAS – SLIPS

With the mentorship programme we are running out the BNI Passport. Each new member will receive a passport to complete and part of this is to arrange a meeting with each member of the Leadership Team and some other members. Below are the topics you need to discuss with them and some notes to help you along.

1.) USE AND COMPLETION OF SLIPS

Have examples of the slips available as well as a computer and internet to demonstrate the online slips.

a) Referrals (Inside and Outside) (White)

- Referrals are given to the relevant member as soon as possible after the opportunity arises and are only recorded at the meeting for administrative purposes;
- From – your name and surname (not your company name);
- To – the member you are referring's name and surname (not company name);
- If the member is in another chapter, make a mention of it next to their name;
- Details of the person who is in need of the product/service – their name, surname and telephone number;
- If there is no telephone number, it is not seen as a valid referral;
- A short description of what the referral is about;
- Is this an Inside referral? – you personally doing business with another BNI member;
- Or an Outside referral? – you referring someone else (a 3rd party) to the BNI member;
- An inside referral will only be entered on a slip (or online) once the business has been done;
- An outside referral is an opportunity to do business with a person that is in the market for a specific product or service and it remains the member receiving the referral's responsibility to close;
- How hot is the referral – anything below 3 comes close to being a lead; 3 is an opportunity to do business; 4 is a good opportunity and 5 is an excellent opportunity which becomes even better if you actually arrange and go to the meeting with the member you are referring;
- Your visitors to the meeting are recorded on a referral slip, as it is a referral to the chapter;
- Please remember that we never give visitors referrals – they have not paid for the privilege and they cannot be held accountable if something goes awry;
- Tear off the top 3 pages BEFORE you start writing;
- The white slip goes to the member receiving the referral, the pink slip is for the Vice president and the yellow slip is for your records.

b) CEU's (Chapter Education Units) (Yellow)

CEU's are all about you learning to become a better networker.

Only BNI related and approved material and events (mentioned on the slips) count for points.

- The BNI CD – you receive this in your induction pack. You are more than welcome to listen to it every week, but you cannot count that as CEU points each time. Once a year is acceptable;
- SuccessNet – you register for this online at www.bni-jhb.co.za. Just click on the link and register. SuccessNet is an online booklet with several articles. All the articles should be read to qualify for the points;
- BNI Podcasts – you can register for this the same as above. Remember – you listen to 5 podcasts for 1 point, 10 podcasts for 2 points and so on;
- Trainings – every time you attend a BNI training (MSP, Advanced MSP, BNI Connect, Leadership Team), you qualify for points;
- Other BNI endorsed workshops – this includes the annual BNI national conference and other networking workshops approved by the Executive director;
- BNI book – these are books written or co-written by Dr. Ivan Misner of which quite a few are available (e.g. The 29% Solution, Networking and Sex – not what you think, Room full of referrals, Networking like a Pro, etc.). Speak to the Educational Co-ordinator about setting up a chapter library if you do not have one.

c) 1-2-1 Follow up (Blue)

- Initiated by – This will always be your name. This means that you are the person who LISTENED and LEARNED about the other member's business. If it was a back-to-back 1-2-1, both members will complete a slip with their own name at "Initiated by", regardless of who made the initial contact;
- Met with – this is the member's name whose business was discussed. They did the TALKING and TRAINING;
- Location – where you met;
- Topics – On what did you focus during your discussion or what did you learn about the member or their business that stood out for you;
- Chapter – your chapter name;
- Date – of your chapter meeting and not of the 1-2-1 meeting
- 1-2-1 slips are only completed AFTER you have had the meeting – it is not meant as a means of making an appointment.

d) Thank You For Closed Business (TYFCB) (Green)

- Thank you to – the name of the member who gave you the referral that turned into business;
- From – this is your name;
- Amount – this will be the full amount of the invoice (incl. VAT) – cents are not mentioned. If you work on a commission basis, it will be your commission amount;



- Comment – this is optional - you can mention which referral turned into business.

TYFCB is allocated to the person who gave the referral and not the member who made the money.

Only you know how much money you make from BNI referrals.

If you feel your TYFCB is confidential, enter it online. That way only you know to whom you gave the TYFCB and the amount.

e) Online Slips

- All the above mentioned slips can be entered online on your BNI Connect page;
- This will be on your landing page where you will also find your BNI statistics;
- Entering the slips online, works much the same as completing the paper slips, but with some added benefits:
- When you enter a referral online, the member receiving the referral gets an email with all the necessary information within minutes of you entering it. This way there cannot be any misunderstandings because of incorrectly heard information;
- A 1-2-1 is only entered online if it was a back-to-back 1-2-1. Only one of the 2 members will enter it online as both members are credited automatically;
- Entering slips online is especially important if you do business with members from other chapters;
- If you have TYFCB to a member of another chapter, they will only be credited with it if you enter the slip online – if you only complete a slip at your chapter, they are not credited as the VP cannot access another chapter's PALMS;
- Before your BNI meeting, you can print all the slips you have entered online. Go to Personal Meeting Activity, enter the date and select list or slip;
- The list is a printed list of everything you have entered that week;
- The slips option prints out all the referrals separately and you can cut them out, and list your 1-2-1's and TYFCB;
- Visitors cannot be entered on an online slip.