

1 to 1 MEETING PLANNER

Get to Know Your Members, Build Relationships, and Increase Your Referrals

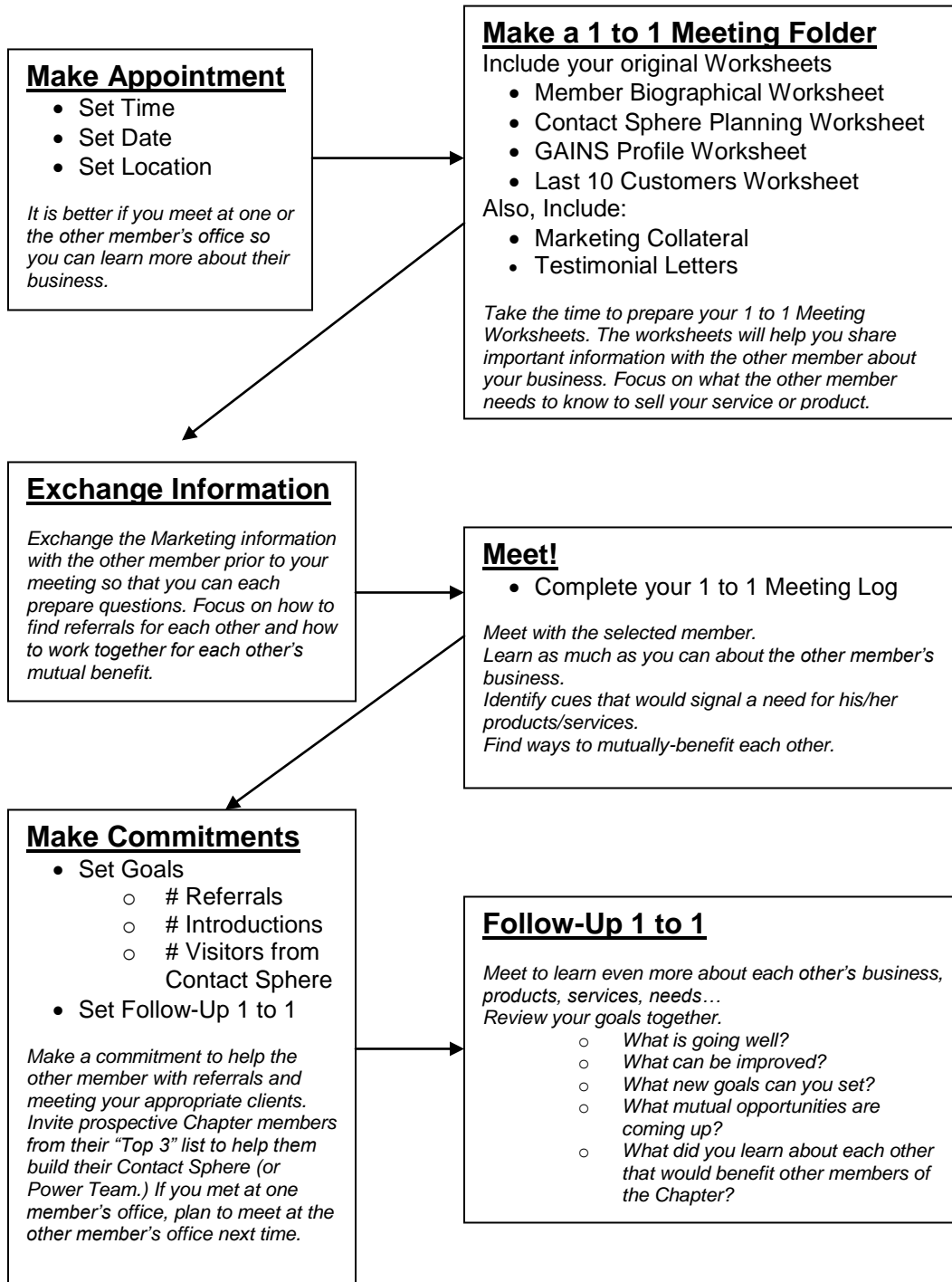
This 1 to 1 Meeting Planner is designed to help you and the member you meet with, get the most from your 1 to 1 Meeting. You will also find that the questions you answer in completing the worksheets will help you with the marketing plan for your own business.

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1 to 1 MEETING PROCESS DIAGRAM

It's as simple as scheduling one meeting a week with one of your BNI Chapter members!



MEMBER BIOGRAPHICAL SHEET

Please note: all information provided is on a voluntary basis. Respect each person's privacy and **keep all Personal Information Confidential** between members.

Personal Information			
Name		Preferred Name	
Spouse/Significant Other		Contact Phone	
Address		Cell Phone	
City/Zip		Email	
Family Member		Family Member	
Family Member		Family Member	
Family Member		Pet	
Hobbies			
Activities of Interest			
Burning Desire			
Something no one knows about you...			
Your key to Success is...			
Other			

Professional Information			
Your Profession			
Name of Business			
Headquarters Location			
Your Work Location			
Special Certifications/ Licenses/ Credentials			
Primary Product/ Service			
Memory Hook			
Years in this Business		Number of Employees	
Prior Business Experience			
Why you entered this profession			
Other			

Date this Profile was prepared	
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GAINS PROFILE WORKSHEET

Name		Date of Profile	
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The Purpose of the GAINS Profile Worksheet is to help you identify those things that will help other members of your Contact Sphere and Chapter immediately think of you when a referral opportunity arises.

<p>Goals</p> <ul style="list-style-type: none"> • <i>What are the business or personal dreams, desires, wants, or needs you want to meet?</i> • <i>How can you help this member achieve his/her goals?</i> • <i>How can the member help you achieve your goals?</i> 	
<p>Accomplishments</p> <ul style="list-style-type: none"> • <i>What are your business and/or personal achievements that best demonstrate your capabilities, skills, and/or experience?</i> • <i>What are your achievements that are most meaningful to new prospects for your product/service?</i> • <i>Which of your accomplishments have moved you closest to achieving your goals?</i> • <i>Which of your accomplishments do your clients value most?</i> 	
<p>Interests</p> <ul style="list-style-type: none"> • <i>What are your interests that would form the basis for a good connection with potential clients?</i> 	
<p>Networks</p> <ul style="list-style-type: none"> • <i>With which formal organizations, associations, institutions, companies and firms do you associate?</i> • <i>What are your informal networks?</i> 	
<p>Skills, Credentials, Licenses, Certifications, Designations...</p> <ul style="list-style-type: none"> • <i>What skills do you have that potential clients would find important to them?</i> • <i>What special talent do you have that potential clients value?</i> • <i>What certifications, credentials and/or designations do you hold that would be important to your clients?</i> 	




CONTACT SPHERE PLANNING WORKSHEET

Contact Spheres are made up of businesses or professions that naturally provide a source of referrals for one another. They are in somewhat related but non-competitive businesses. Businesses in the same Contact Sphere have a symbiotic relationship in that they support and enhance one another.

Enter the professions or type of businesses that are referral sources. Focus primarily on those professions or businesses that you need to add to your Contact Sphere or Power Team – although you may include professions and businesses that are already members of the Chapter.

Businesses that Provide a Source of Referrals for YOU	Business for which You are a Source of Referrals
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.

From the list above, write the names of the Top 3 professions or businesses you want to add to your Contact Sphere. Share your Top 3 with the other member.



TOP 3

1. _____
2. _____
3. _____



LAST 10 CUSTOMERS WORKSHEET

The purpose of this worksheet is to help you identify the characteristics of your last ten customers so that others can find similar customers for You!

Customer	How did you find them?	What product/service did you provide for them?	What problem did you solve for them?
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Based on your customer base:

What are good referral sources for You?	What customer problems are good opportunities for You?	What are not good referrals for You?



1 TO 1 MEETING RECORD

Members Attending this Meeting:

Member(s)		Profession or Business	
1.			
2.			
3.			
Day		Date	
Location		Time	

Key Questions

- 1) What are the primary goals?

- 2) Summarize value-added Accomplishments, Skills, Credentials, Designations, Licenses...for customers:

- 3) Summarize company strengths; competitive advantages:

- 4) Description of best/target customers:

- 5) Characteristics of best referral:

- 6) Characteristics of customer that is not a good referral:

- 7) Key phrases or circumstances that indicate an opportunity:

Commitments

Goals	Top 3 Contact Sphere Members
1. _____ Referrals per _____	1.
2. _____ Introductions per _____	2.
3. _____ Visitors per _____	3.

Follow-Up 1 to 1 Meeting

Date: _____ Time: _____ Location: _____



1 TO 1 MEETING LOG

The 1 to 1 Meeting is conducted outside of the regular Weekly Chapter Business Meeting. It is a great way to learn more about other members, and to share more information about your business. It is a method to use to build stronger relationships with each other. Use this log to track your Meetings and then to analyze them.

Week	Date	Member	Location	Time
Week 1				
Week 2				
Week 3				
Week 4				
Week 5				
Week 6				
Week 7				
Week 8				
Week 9				
Week 10				
Week 11				
Week 12				
Week 13				
Week 14				
Week 15				
Week 16				
Week 17				
Week 18				
Week 19				
Week 20				
Week 25				
Week 26				

1 to1 Meeting Review:

- 1) Have you met with every member of your Contact Sphere?
- 2) Have you met with every member of your Chapter?
- 3) Have you met with visitor's who would be good additions to your Contact Sphere?
- 4) Have you had 1 to 1 Meetings with those members who provide you with the least referrals?
- 5) Have you had follow-up 1 to 1 Meetings with the members who provide you with the most referrals?

