



# 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.



# 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.

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## 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.

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## 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.

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## 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.

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## 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.

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# 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?

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

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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? \_\_\_\_\_

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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.

