

## One to One Planner

### **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, GAINS Worksheet, Contact Sphere Planning Worksheet, and Previous 10 Customers Worksheet.

PRODUCTIVE | EFFECTIVE | EFFICIENT







## **BN1** Member Biography Sheet

Name:	Date:
Business Information	
Business Name:	
Profession:	
Location:	Years in Business:
Previous types of jobs:	
Personal Information	
Family Information	
A. Spouse / Significate Other	
B. Children	
C. Animals	
Hobbies:	
Activities of interest:	
City of residence:	How long?
Miscellaneous	
My burning desire is to:	
Something no one knows about me:	
My key to success:	



Use this form to record GAINS for yourself 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 o people who are important to you. The best way to develop a rethat's important to them. If you do, they'll remember you when	elationship is by helping someone achieve something
Accomplishments:	at goals they have achieved, what projects they've
Some of your best insight into others comes from knowing wh completed, what they have accomplished both for themselves experiences, values, and beliefs can be surmised from their and the surmised from their and the surmised from	and for others. Your fellow member's knowledge, skills,
nterests  Your interests – the things you enjoy doing, talking about, listed People are more willing to spend time with those who share the	
Networks	
How would it benefit you to know what other networks, both fow with? A network could be an organization, institution, company	
Skills As for Skills, the more you know about the talents, abilities, ar	and assets of the people in your natwork, the botton equipped

you are to find competent, affordable service when you or someone you know needs help.



## BNI 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.

My Contact Sphere is \_\_\_\_\_

	What other three professions would help you round ou
1	your Contact Sphere? Write them down in the space below
2	Profession 1:
3	_
4	Profession 2:
5	_
6.	
7	Profession 3:
8	-
9.	
10	Make a commitment to your One-to-One partner to help fil their Contact Sphere by inviting people to BNI that are in his/her top 3.
	Commitment:



# BNI Previous 10 Customers Worksheet Imagine how voll can increase the ref

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

- List your previous 10 customers below. 1.
- Select the ones that are ideal clients or a good referral for you. 2.
- 3. Write your answers to questions in the spaces provided.

	Customer, Industry or Description	What did you do for them? If an Ideal Client, describe why.	Ideal Client
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			



ame, Company or Industry:	Conversation Starter (What to say):	By When?
	wel that your DNII by single partners are halfs you	
dentity one long-term goal/relet	ral that your BNI business partner can help you	acmeve.
What action stone need to be to	ken to make this long-term goal/referral a reality	2
viiat action steps need to be ta	iken to make this long-term goal/relenal a reality	!
	By when?	



# Let's review the system! It's as simple as scheduling one Rusiness (C)

#### Set Time, Date and Place

- Restaurant
- Someone's Office (preferred)
- Virtual (Zoom, MS Teams, Etc.)

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.

### **Exchange Info Before the** Meeting

Email your four worksheets to your business partner before the meeting. Agree on and set a simple agenda for the meeting to honor their time commitment.

#### **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. Use this time wisely.

### Follow-Up

Follow up within 2-3 days of your meeting. Let your partner know how your action items are coming along and what other plans you may have to help them.

#### **Prepare Your Worksheets**

- Member Bio Sheet
- GAINS Profile
- Contact Sphere Worksheet
- Previous 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. Update them every 3-6 months.

#### **Bring Worksheets**

Bring the same materials to the One-to-One that you 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.

#### **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 next 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 longterm. 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.