



Mountain South Region

Member Success Program

Training Workbook

Revised June 1, 2026

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This Member Success Program Manual is designed to provide an orientation regarding the basic policies, procedures, premises and program of the BNI® System. Throughout this document, references made to a Director may refer to a Director, Director Consultant or Executive Director. However, nothing contained herein shall change or impact the relationship the Director or Director Consultant has with BNI® (where applicable) or the Franchisee.

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BNI® | Introduction

The material in this document provides you with tools for enhancing your BNI success and information that shares the foundational elements of BNI ... structure and education. The materials presented have been developed by BNI Members, Directors and staff. It is designed as a reference for you.

There are four sections:

1. **Your Participation** helps you learn that success in BNI is a journey that is more about “farming” than it is about “hunting.” It is about cultivating long-term, meaningful relationships. You will also learn how to develop effective Weekly Presentations and Feature Presentations.
2. **Your Chapter** covers BNI’s philosophy, policies and guidelines.
3. **Your Success** explains Contact Spheres, Personal Goals, Performance Goals and the Contract for Profitability.
4. **Plan Your One-to-Ones** provides you with a One-to-One Planner, GAINS Worksheet, a Contact Sphere Planning Worksheet, and more.

This document is a reference tool that reinforces the philosophy and mission of BNI. Our philosophy is built upon the idea of Givers Gain®. By giving business to others, you will get business in return. This is predicated on the age-old idea of “what goes around comes around.”

Our mission is to help members increase their business through a structured, positive and professional referral program that enables them to develop long-term, meaningful relationships with quality business professionals.

Finally, the magic of this document is in your hands. When you actively use the tools and ideas presented, **SUCCESS WILL FOLLOW**, with stronger relationships, more referrals and increased rewards.

Remember, in BNI, “It is not NET-SIT or NET-EAT, it is NETWORK.”

We present this to you with pleasure!



Elaine Zambos
Executive Director
BNI Mountain South



Ivan R. Misner, Ph. D
Founder and Chief Visionary Officer
BNI Global, LLC

BNI® | Welcome to Your Chapter

BNI®'s Philosophy

Success in BNI® means you need to be a positive and supportive member of an organization based upon mutual support. This requires commitment to your fellow members as well as to the philosophy of Givers Gain®. By giving business to others, you will get business in return.

Mission Statement

Our mission is to help members increase their business through a structured, positive and professional referral program that enables them to develop long-term, meaningful relationships with quality business professionals.

BNI® Core Values

1. Givers Gain®
2. Building Relationships
3. Life-Long Learning
4. Traditions + Innovation
5. Positive Attitude
6. Accountability
7. Recognition

BNI® Code of Ethics

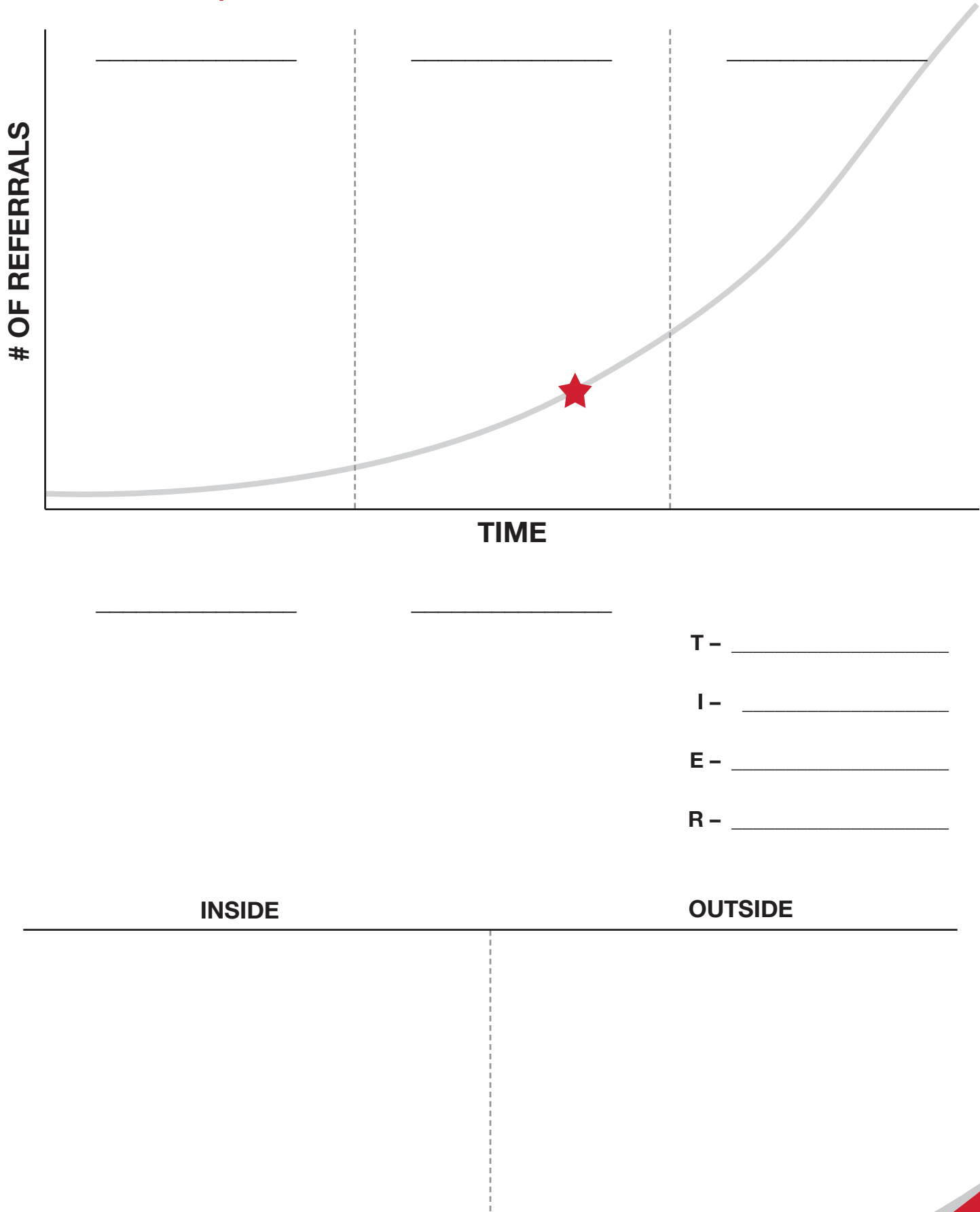
1. I will provide the quality of services at the prices that I have quoted.
2. I will be truthful with the Members and their referrals.
3. I will build goodwill and trust among Members and their referrals.
4. I will take responsibility for following up on the referrals I receive.
5. I will display a positive and supportive attitude.
6. I will live up to the ethical standards of my profession.

Professional standards outlined in a formal code of conduct for any profession supersede the above standards. This means that a Member belonging to a profession that has a more stringent standard must adhere to that higher standard.

BNI[®]

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Referral Curve



Your Lowest Common Denominators

Break your business/profession down to its critical parts (specific products or services, selected “target markets,” particular benefits, etc.) Include the support material (brochures, letters, references, samples, pictures, etc.) that will support each LCD.

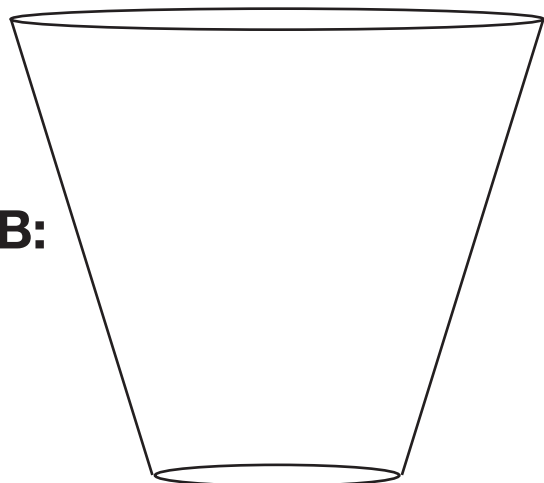
LCD	Support Material
1. Products or Services _____ _____ _____ _____	1. _____ _____ _____ _____
2. Target Markets _____ _____ _____ _____	2. _____ _____ _____ _____
3. Benefits _____ _____ _____ _____	3. _____ _____ _____ _____
4. Qualifications _____ _____ _____ _____	4. _____ _____ _____ _____
5. Other _____ _____ _____ _____	5. _____ _____ _____ _____

Word's to Avoid:

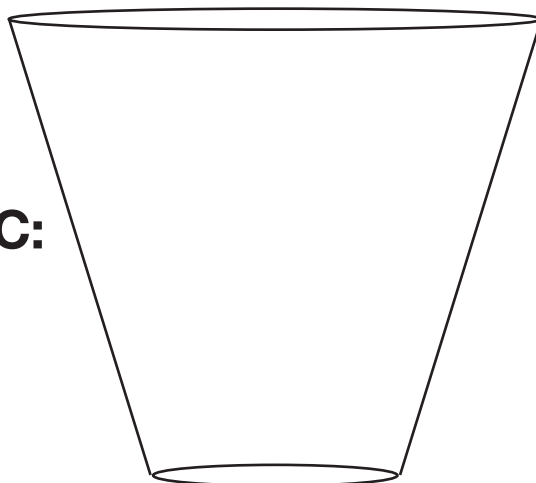
Weekly Presentation Outline

1. _____
2. _____
3. _____
4. _____
5. _____

B2B:



B2C:



Your Practice Weekly Presentation

DO

AVOID

Begin With the End in Mind

1. What are the desired results?
2. What are the top three things you want attendees to walk away knowing about you and your business?
3. Who do you want attendees to refer you to?
4. There are a few ways to start...

BNI® | 3 Minute Launch Pad

Now that your BNI Chapter has reviewed your Membership Application and approved you as a new Member, please prepare a 3- to 5-minute introductory presentation. This is a way for the chapter members to be better acquainted with you and your business. Be prepared to present your Member Launching Pad introduction at the next meeting. Contact your chapter President or Secretary/Treasurer to be scheduled for next week's agenda.

Be sure to stay within the time limit of 3- to 5-minutes maximum. There will be no question and answer period. Consider closing with an invitation to schedule a One-to-One if there are specific questions.

If you need assistance, contact your Mentor Coordinator, a Leadership Team Member, a Membership Committee Member or your sponsor. Everyone here wants you to be successful!

My 3 best customers are:

1. _____
2. _____
3. _____

Examples of referrals that work well for me are:

1. _____
2. _____
3. _____

My best Contact Sphere professions are:

1. _____
2. _____
3. _____

New doors I'd like to open include:

1. _____
2. _____
3. _____

BNI® | Your Contact Sphere

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

After you've identified what professions are in your contact sphere, circle the number next to the ones that are not currently represented in your Chapter. Announce at your next Chapter meeting what professions you'd like to see filled in your Chapter. By asking other Chapter Members if they know someone in that field, they may be more willing to invite them to visit the Chapter.

Your Profession/Business

Related Professions:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

BNI® | Contact Sphere Examples

In a successful BNI chapter you will find five Contact Spheres with five or more members per sphere, for a total chapter size of 25-30 members. In this environment, members will find 50% of their referrals coming from their Contact Sphere and the other 50% of their referrals coming from the rest of the chapter.

The following lists are examples of professional categories that fit the contact sphere profile. It is important to note that some professions will be in more than one Contact Sphere and that there could be more professional categories than are listed here.



Business

Answering Service
Attorney, Corporate
Business Coach
Fleet Sales
Human Resources
Janitorial Services
Management Consultant
Office Furniture
Office Supplies
Organizer
Phone Service
Staffing Agency

Health & Wellness

Air Purification
Assisted Living
Chiropractor
Cosmetic Sales
Dentist
Hairstylist
Health Insurance
Home Health Care
Image Consultant
Jeweler
Massage Therapist
Medical Billing
Nutritional Products
Nutritionist
Optometrist
Personal Trainer
Psychotherapist
Speech Pathologist
Veterinarian
Water Purification

Events

Bakery
Bridal Shop
Caterer
Coffee Service
Disc Jockey
Event Planner
Florists
Gift Baskets
Limousine Service
Photographer
Travel Agent
Videographer
Wedding Coordinator

Financial

Accounting
Attorney, Elder Law
Attorney, Estate Planning
Banker
Bookkeeping
Business Insurance
Charitable Organizations
Collection Agency
Employee Benefits
Financial Planner
Insurance, Health & Life
Merchant Services

Marketing

Advertising Agency
Direct Mail
Event Planner
Formal Wear
Graphic Design
Photographer
Printer
Promotional Products
Public Relations
Signs
Website Design

Real Estate

Appraiser
Attorney, Real Estate
Commercial Real Estate
Home Inspector
Insurance, Property & Casualty
Interior Design
Landscaping
Mortgage Lender
Moving Company
Property Management
Relocation Coordinator
Residential Real Estate
Security Systems
Title Company

Specialty Services

Alterations
Auto Body Shop
Auto Sales
Clothier
Cosmetic Sales
Furniture Company
Image Consultant
Jeweler
Kitchen Consultant
Moving Company
Nail Artist
Personal Chef
Personal Organizer
Pet Sitting
Restoration Services
Upholsterer
Trophies

Technology

Answering Service
Business Machines
Cellular/Paging
Commercial Security Systems
Computer Sales & Service
Computer Networking
Digital Data/Internet
Equipment Rental
Local Phone Services

Trades

Architect
Carpenter
Contractor
Electrician
Floor Coverings
HVAC
Interior Designer
Landscaping
Painter
Pest Control
Plumber
Roofer
Window Coverings

BNI | How to Give Good Referrals

Definition of a Referral

The opportunity to do business with someone who is in the market to buy your product or service. (It is not a guaranteed sale, but an open door to discuss your business.)

In giving a good referral there are six points to follow:

1. Listen for a need from someone you have met. A good networker has two ears and one mouth and uses them proportionately.
2. Tell the individual that you know someone who can provide that service.
3. If you have done business with the member, share your experience.
4. Give out the business card of the person you are referring and ask for the individual's card.
5. Ask if it is okay to have the member call.
6. If the answer is yes, get information to chapter member immediately; complete the Referral Slip and submit at chapter meeting.

Here are some examples of a good referral:

Hot Referral—Someone needs a telephone system for a new office. A member of BNI gave him your business card and he is expecting your call.

Warm Referral—Someone is new to the area and needs a good chiropractor. A member of BNI gave her your business card and she wants you to call her next week.

Tepid Referral—Someone is shopping for auto insurance and is interested in a quote from your company. A member of BNI gave him your business card and you should call him soon.

Note: Some professions (such as attorneys) have professional rules that prevent them from contacting a referral directly.

Referral Responsibility:

1. Make the Referral _____
2. Handle Them _____
3. Get More _____
4. Treat Them as _____

5. Say _____
6. Do _____

What is a Good Referral?

- _____
- _____
- _____
- _____

Why do we Invite Consistently?

1. For R_____
2. Chapter/Member E_____ new business owners
3. To D_____ Contact Spheres
4. To help B_____ contacts and relationships outside the chapter
5. To counteract chapter A_____

Who do we Invite?

F – _____

R – _____

O – _____

G – _____

S – _____

The GRIP Method:

G – Would you like to Grow your business?

R – Would new client Referrals help to grow your business?

I – I'd like to Introduce you to a group of business professionals, who are ready to pass referrals to someone in your profession. Interested?

P – We will be meeting this (date) from (time) at the (location) = Place.

BNI® | Gold Club Badge

Once you sponsor six new Members, you qualify for a Gold Club Badge. Simply fill out the information below, have your President verify and send to your Director.

Chapter Name _____

Your Name _____

Date _____

New Members Sponsored

	Name	Profession	Date Inducted
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____
9.	_____	_____	_____

BNI | Contribution Program

Contribution Tracking Program

The BNI Contribution Tracking Program was developed to measure and track Members' success and activity. Like a business will set and track goals, so does every BNI Chapter. The following slips are part of the BNI Contribution Tracking Program:

One-to-One Follow-Up Slips

Chapter Education Unit Slips

Referral Slips

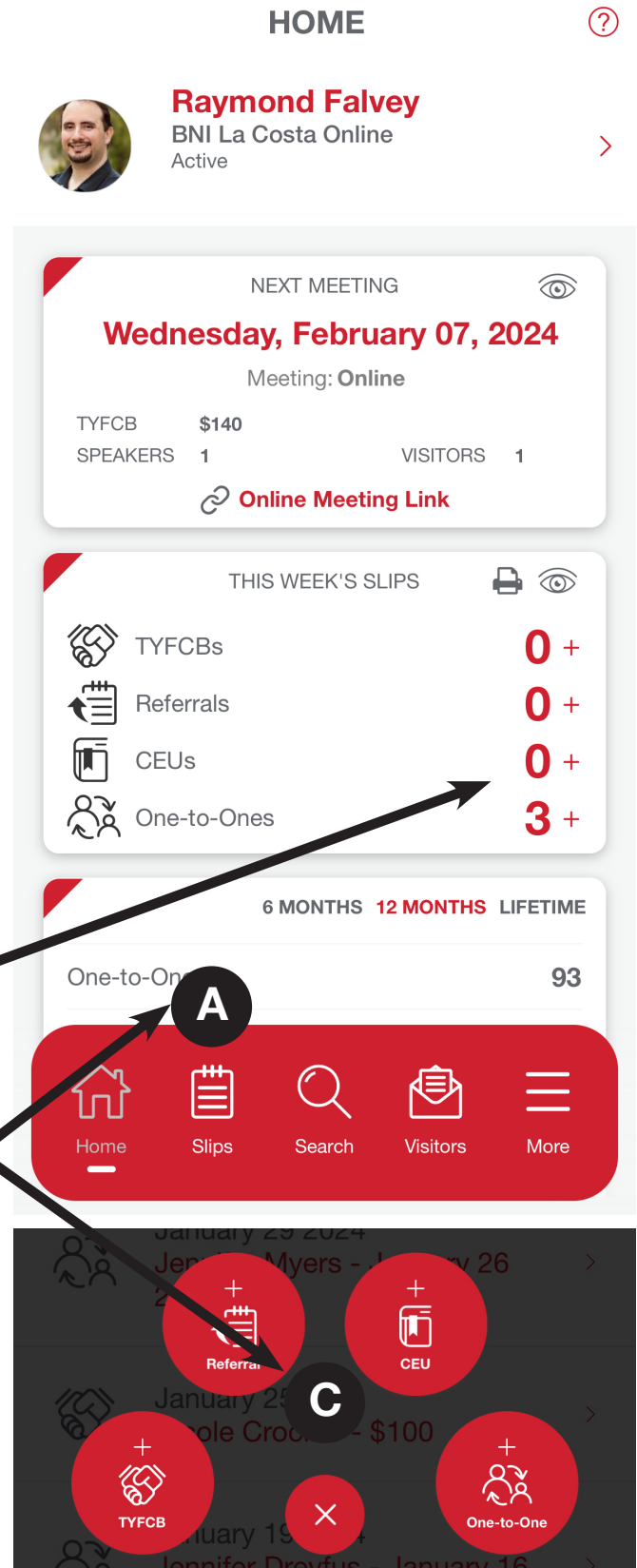
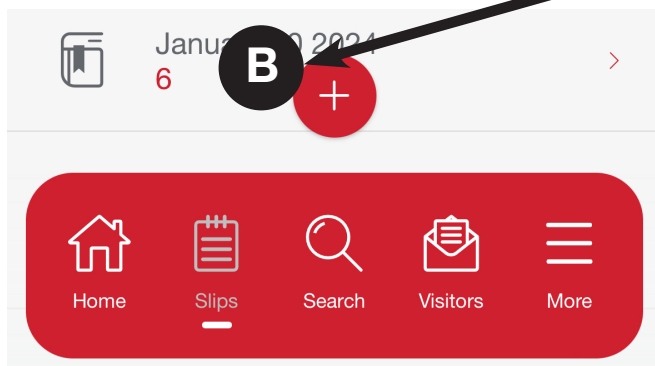
Thank You for Closed Business Slips

All slips can be entered either by using the BNI Connect App or by entering them online at www.bniconnect.com. Using your username and password, go to My BNI Business and Submit your respective slips on the lower half of the page. By entering your slips online, you are now able to track your activity electronically, reduce the paperwork within your Chapter, as well as automatically enter your personal activity on the Chapter PALMS Report, thereby saving your Vice President time!

How to Access the Slips

Option 1: Click on the number next to the name of the slips on the home screen.

Option 2: A) Click on the Slips Button on the bottom of the screen in the red bar, then B) Click on the Red Plus sign, and Finally C) Choose the slip you want to submit.



One-to-Ones

Purpose

One-to-Ones are key to relationship building and learning how to pass higher quality referrals to your BNI Chapter Members.

Completion

The Member who initiated the One-to-One enters the One-to-One in the App, or Online

Reporting

When a Member enters a One-to-One online, both parties receive credit for completing the One-to-One. With online reporting, a Member can enter One-to-Ones with Ambassadors, Directors and Members of other BNI Chapters within the region, as well as Members within their own Chapter. For detailed instructions, visit BNI Connect Help.

BNI Chapter Meeting. The Vice President will credit each Member in BNI Connect.

Here are the steps to record your one-to-ones in the BNI Connect App:

1. Select the Member in your chapter, or
2. If it is a member outside your chapter, click on the magnifying glass icon to do a worldwide search.
3. Select who initiated the One-to-One.
4. Enter where the One-to-One took place.
5. Enter the date of the One-to-One: make sure the date is correct. If both members try to enter the one-to-one, the system will notify the second person entering it that the one-to-one was already entered.
6. Enter any notes that you have about the One-to-One including when you want to follow up, and what Referral Commitments you have made.
7. Complete the slip by hitting the Submit button.

<
ONE-TO-ONE SLIP
?

1 Met With: 2

3 Initiated By ▼

4 Where did you meet?

5 Sunday, February 04, 2024

6 Topics of Conversation

7 Confirm

Home

Slips

Search

Visitors

More

Chapter Education Units (CEUs)

Purpose

Have you ever heard the phrase: “Learn More to Earn More”? There is a direct correlation between networking education you complete and revenue you generate from referrals. Submit your Chapter Education Units to report training and education you achieve through BNI sources.

Completion

The Member who completes any level of education listed enters the Chapter Education Units online.

Reporting

When a Member enters Chapter Education Units online, the data is automatically entered into that week's PALMS Report. No paper CEU slip is necessary.

Here are the steps to record your one-to-ones in the BNI Connect App:

1. If you have completed 1 hour of online, podcasts, etc. training then click on the red number on the side and select the quantity of hours.
2. If you have completed 1 hour of in person training then click on the red number on the side and select the quantity of hours.
3. If you completed two hours of training (these are typically BNI San Diego Calendar events) click on the red number on the side and select the quantity of hours.
4. If you completed three hours of training (events such as the Member Success Program) click on the red number on the side and select the quantity of hours.
5. If you completed four or five hours of training (events such as Leadership and Support Team Training) click on the red number on the side and select the quantity of hours.
6. Complete the slip by hitting the Submit button.

<

CEU SLIP

?

1

1 Hour of BNI Podcasts, Webinars, BNI SuccessNet, etc.

Credits/Course: 1 Total: 0

2

1 Hour of BNI University or In Person Learning

Credits/Course: 1 Total: 0

3

2 Hours of BNI University or In Person Learning

Credits/Course: 2 Total: 0

4

3 Hours of BNI University or In Person Learning

Credits/Course: 3 Total: 0

5

4 Hours of BNI University or In Person Learning

Credits/Course: 4 Total: 0

6

Confirm

Home

Slips

Search

Visitors

More

Referrals

Purpose

Referral Slips are not the actual referral, rather a mechanism to pass and record the information about the referral. When a potential referral is identified, contact the Member immediately to pass along the information **so the referral can be acted upon in a timely manner.**

Completion

The Member who is making the referral connection enters the referral online.

Reporting

When a Member enters a Referral online, the data is automatically entered into that week's PALMS Report. Additionally, the Member receiving the referral automatically receives an email indicating the referral information so contact can be made right away.

Here are the steps to record your one-to-ones in the BNI Connect App:

1. Select the Member in your chapter, or
2. If it is a member outside your chapter, click on the magnifying glass icon to do a worldwide search.
3. Select if it is an **Inside** (member to member) referral or an **Outside** (someone outside the chapter).
4. Let your referral partner know what you let the referee know, whether the referral is told the member will call them, and/or you shared their contact information.
5. Give the contact information for the referral. (**required information: Name, Telephone and Email**).
6. Give your referral partner information about the referral needs, etc.
7. Let your referral partner know how hot the referral is.
8. Finally, submit the referral.

The screenshot shows the 'REFERRAL SLIP' form in the BNI Connect App. The form is titled 'REFERRAL SLIP' with a back arrow on the left and a help icon on the right. The steps are numbered 1 through 8:

1. Search for a member (magnifying glass icon).
2. Select the member (magnifying glass icon).
3. Select the referral type: 'Inside' (selected) or 'Outside'.
4. Select the referral status: 'Told Them You Would Call' (selected) or 'Given Your Card'.
5. Enter the referral details: Name, Telephone, Email, and Address.
6. Enter comments.
7. Select how hot the referral is (5 levels of heat, from yellow to red).
8. Confirm the referral (Confirm button).

Thank You for Closed Business

Purpose

The Thank You for Closed Business (TYFCB) program is used as a note of appreciation and acknowledgment to the Member who GAVE you a business-generating referral. The program acknowledges Members passing qualified referrals, as well as measuring the value they are providing. It is important that the Member who receives the referral acknowledge the Member who passed them the referral. Whether online or using the paper slips, report revenue you generate from referrals you receive. When you submit this data, you remain anonymous. Be consistent in your reporting.

Completion

The Member who receives the Referral enters the Closed Business in the App, or Online

Reporting

When a Member enters their Thank You for Closed Business online, the data is automatically entered into that week's PALMS Report for the Member that is being recognized. When TYFCB is reported online,

Here are the steps to record your one-to-ones in the BNI Connect App:

1. Select the Member in your chapter, or
2. If it is a member outside your chapter, click on the magnifying glass icon to do a worldwide search.
3. Enter the amount of the Closed Business.
4. Enter if it is new business or a returning client.
5. Enter if it was an Inside, Outside, or Tier 3+.
6. Enter any comments about the job..
7. Complete the slip by hitting the Submit button.

<

RECORD TYFCB

?

1 Thank you to: 2

3 \$ Amount

Business Type

4 New Repeat

Referral Type

5 Inside Outside Tier3+

6 Comments:

7 Confirm

Home Slips Search Visitors More

What Value Do I Enter as Thank You for Closed Business?

Here is a general explanation of how to track closed business based on what type of business you are in. Not all professions are listed below. Use the suggestions below and common sense when it comes to measuring your profession's results with consistency. Consistency is the key!

Commission-Based Industries

Enter your gross commission figure. Commission Based Industries:

Realtor: A realtor sells a home for \$400,000. Most of that money goes to an owner or a bank. But the full amount that comes to the brokerage is credited to BNI even though the individual realtor may earn less than the full commission. A realtor would write down the total fee to their company on the sale of the house. A \$400,000 house with a 7% realtor fee would be entered as \$28,000.

Insurance Fields: Enter the amount of the premium check. If the car insurance is \$600 per year, the amount entered is \$600. It is recommended that the annual value of the insurance plan is entered, even if they are paying month-to-month. This way a TYFCB slip only has to be submitted once per year.

Financial Advisors: Enter amount of the commission fees, whether a fixed rate or percentage of portfolio amount. If the account is \$1,000,000 and the fee is \$1000, the amount entered is \$1000. If you work for an insurance company or an investment firm, the amount the customer is paying is what you credit to your BNI team Member, rather than the amount that actually ends up in your pocket.

Service Providers

Enter the gross amount you charged for your service. A \$1,500 service fee would be entered as \$1,500. Examples: **Website designer, Business coaching, Pool repair/leak detection, Title Service, Photographer, Salon / Spa, Graphic designer, CPA, Entertainer, Pest Control, IT support, Attorney, Medical doctors, Dentists, Naturopaths, Chiropractors, Massage Therapist**

Product Providers

The gross sale of the product plus service costs. A \$500 air filter plus \$100 installation would be reported as \$600. Include any insurance claims if applicable. Examples include: **HVAC, Fencing, Shutters, Roofing, Plumbing, Flooring, Cabinets, Landscape design and installation, Custom wood products, General contractor, Alarm systems and monitoring, Promotional products, printing, Online sales (greeting cards, etc.), Nutritional products, Weight loss products/programs**

Banking

One tricky category is banking. If a banker has a way of tracking how much revenue is coming into the bank, then this would be reported. Otherwise, please follow the definitions below to report closed business for non-commissioned referrals to banks: **Loans:** Report the interest that would be generated if the loan would go full term; **Deposits:** Report 10% of the initial amount to open an account; **Lines of Credits** (i.e. credit cards, home equity loans, commercial lines of credit, etc.): Report 10% of the line amount

BNI® | Chapter Program Guidelines

Program Guidelines are not policies, but are recommended practices that allow chapters to run more smoothly and effectively.

Visiting Chapters

- Members visiting other chapters should announce that they are from another chapter.
- Visiting members must not do or say anything that competes with a member of that chapter.
- The chapter should be cautious in giving referrals to individuals they don't know, including visiting members.
- Visiting members should pay for their own meal.
- Before visiting another chapter, the visiting member should call that chapter's President first.
- Visiting members follow the same visiting policies as non-members; no more than two visits allowed.

Absences and Tardiness

- Absences and tardiness mean less business for members; therefore, the Membership Committee may give warnings to members who are consistently late or leave early. If the problem continues, the member's classification may be subject to being re-opened.

Substitute Program

- Potential substitutes include customers, friends, family and/or employees.
- The primary purpose for a substitute is to represent a BNI® Member. BNI® recommends minimal use of a substitute. However, a member may use substitutes up to three times in a rolling six-month period.
- Members should alert the chapter of a substitute so that the Visitor Host can be there to greet him/her.

Business Representation

- Members agree to only represent the business classification approved by the Membership Committee.
- Members of BNI® who represent multi-level marketing organizations should represent their products and services in BNI® and not the business opportunity element of their business.

Non-Discrimination Disclosure Statement

BNI® Global requires that Chapters review and select persons for membership in all job classifications based on qualifications without regard to race, color, gender, religion, national origin, marital status, sexual orientation, age or disability. BNI® will support no Chapter's action when in violation of this non-discrimination statement.

BNI | Top 10 Things BNI Members Do

1. **Referral Confidence Curve:** Understand that Trust Takes Time
2. **Presentations:** Plan, Prepare, and Practice for every presentation you do in BNI.
3. **Be Specific:** Avoid the terms Anyone, Full-service and Small Business
4. **Ask for what you want:** State if you want a cold call or introduction
5. **Stand and say “I Have ...” During the Referrals/Testimonials:**
Give either ONE referral, ONE testimonial, or share ONE visitor you brought to the meeting.
6. **Get and Train Your Substitutes:** You can bring them as your guest prior to the meeting that you will miss.
7. **Follow Up:** If you provide great follow-up service to your Tier 1 and Tier 2 referrals, the Tier 3 referrals will come easy!
8. **Give Feedback to your Referral Sources:** Thank them; Let them know how it went!
9. **Invite, Invite, Invite:** Simplicity is Best in all inviting situations.
10. **One-to-Ones:** Focus on at least one per week, and make a **Referral Commitment** to your One-to-One Partner!