



One-to-One Planner

Referral Strategy Sessions

Get to Know Your Team and Increase Your Referrals



Email your worksheets to the person you will meet with next. The worksheets in this manual include the Member Bio Sheet, GAINS Exchange, Contact Sphere Planning Worksheet, and Previous 10 Customers Worksheet.

P R O D U C T I V E | E F F E C T I V E | E F F I C I E N T





Member Biography Sheet

Name:

Date:

Business Information

Business Name:

Profession:

Location:

Years in Business:

Previous types of jobs:

Personal Information

Family Information

A. Spouse / Significant 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:



GAINS Worksheet

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 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.

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.

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.

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.

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.



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 _____

My Contact Sphere Members

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

Contact Sphere Top 3

What other three professions would help you round out your Contact Sphere? Write them down in the space below.

Profession 1:

Profession 2:

Profession 3:

Make a commitment to your One-to-One partner to help fill their Contact Sphere by inviting people to BNI that are in his/her top 3.

Commitment:



Previous 10 Customers Worksheet

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

- 1. List your previous 10 customers below.
- 2. Select the ones that are ideal clients or a good referral for you.
- 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			☐



Commit to take action!

The success of the One-to-One Business/Strategy Meeting depends on how well you follow through with the actions you have agreed to take.

FIVE Introductions or Prospects I will work on making for _____:

Name, Company or Industry:	Conversation Starter (What to say):	By When?

Identify one long-term goal/referral that your BNI referral partner can help you achieve: _____

What action steps need to be taken to make this long-term goal/referral a reality?

By when? _____

Date of follow up One-to-One Business/Strategy Meeting? _____



Let's review the system!

It's as simple as scheduling one One-to-One, Business/Referral Strategy Session each week with one of your fellow BNI Members.

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.

Prepare Your Worksheets

- Member Bio Sheet
- GAINS Exchange
- 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 referral partner about your business and how to find referrals for you. Update them every 3-6 months.

Exchange Info Before the Meeting

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

Bring Worksheets

Bring the same materials to the One-to-One that you emailed earlier. You can also bring other materials that could help you help each other. For example, you could bring testimonials from satisfied customers, or brochures that your referral partner could display on your behalf.

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.

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 long-term. 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.

Follow-Up

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