

BNI®

**One-to-One
Planner**



How to Hold Effective One-to-Ones

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

1) Make the Appointment

Choose a meeting time and location. It is better if you meet at your one-to-one partner's office because you can learn more about his/her business.

2) Prepare Your Worksheets

Take the time to prepare your one-to-one worksheets (Biography Worksheet • GAINS Worksheet • Previous 10 Customers Worksheet • Contact Sphere Worksheet). Doing so will help you share important information with your one-to-one partner about your business, as well as how to find referrals for you.

3) Exchange Information Before the Meeting

Email your four worksheets to your one-to-one partner before your meeting. Keep the worksheets handy to send to each person you are having one-to-ones with about one week prior to your meeting. Study your partner's worksheets and make notes of what you want to learn more about.

4) Bring Worksheets and Notes to One-to-One

Bring copies of your worksheets, your partner's worksheets and the notes you made while reviewing their worksheets. You can also bring other materials that will help you help each other. For example, you can bring testimonials from your customers.

5) Meet with Your One-to-One Partner

Meet with your one-to-one partner and learn as much as possible about how to find referrals for him/her. Use the worksheets as a way to get started.

6) Commit and Agree on Goals

Make a commitment to help your one-to-one partners with referrals, both short-term and long-term. At the same time, invite prospective BNI members from their "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 next time.

<p>4.3. Biography Sheet Revise your Biography Sheet every six months.</p> <p>Date: _____</p> <p>Name: _____</p> <p>Business Information</p> <p>Business Name: _____</p> <p>Location: _____</p> <p>Profession: _____</p> <p>Years in the Business: _____</p> <p>Previous Types of Jobs: _____</p> <p>Family Information</p> <p>Spouse: _____</p> <p>Children: _____</p> <p>Pets: _____</p> <p>City of Residence: _____</p> <p>How Long? _____</p> <p>Personal Information</p> <p>Hobbies: _____</p> <p>Activities and Interests: _____</p> <p>Dreaming/Desire: _____</p> <p>Something no one here knows about you: _____</p> <p>The Key to Your Success: _____</p> <p>Copyright © 2016 BNI Global, LLC</p>	<p>4.4. GAINS Exchange</p> <p>Name: _____</p> <p>How well do you know the people in your network? Chances are you have a little with the people you already know and concentrate on learning those five essential same kind of information. The more they know about you, the faster your name is opportunity arises in which your products, services, knowledge, skills or expertise.</p> <p>Goals</p> <p>Goals are the business or personal objectives you want or need to reach for contact in the future and the information you need. You need to define your goals and have a clear picture of the other person's goals. The best way to build a relationship with someone is to help them achieve their goals!</p> <p>Accomplishments</p> <p>People like to talk about the things they are proud of. Remember, some of your best might not come from knowing what they did, but from knowing how they did it. Their knowledge, skills, experiences and values can be learned from your experiences. Be ready to share your accomplishments with the people you meet.</p> <p>Interests</p> <p>Your interests can help you connect with others. Interests are things like playing sports, reading books and listening to music. People like to spend time with those who share their interests. When you and your referral source share the same interests, it will strengthen your relationship.</p> <p>Networks</p> <p>You have many networks, both formal and informal. A network can be an organization, institution, company or individual you associate with.</p> <p>Skills</p> <p>Do you know you know about the talents and abilities of the people in your network, the better equipped you are to find and select competent affordable products and services when the need arises. And when you are being able to help someone, relationships, the more people know about your skills, the better your chances.</p> <p>Copyright © 2016 BNI Global, LLC</p>	<p>4.5. Contact Sphere Planning Worksheet</p> <p>Contact spheres are businesses or classifications that naturally provide a another. They are in somewhat related but non-competing businesses. By have a symbiotic relationship in that they support and enhance one another.</p> <p>Contact Sphere</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p> <p>7. _____</p> <p>8. _____</p> <p>9. _____</p> <p>10. _____</p> <p>Make a commitment to your One-to-One partner to his Contact Sphere by inviting people to BNI that are in his</p> <p>This worksheet works best in a business-to-business environment when introduction to a referral source, contact sphere profession or a business in business-to-consumer environment, consider requesting a personal referral a specific profession who would be able to introduce you to your ideal customer contact with them all day, every day.</p> <p>Copyright © 2016 BNI Global, LLC</p>	<p>4.6. Previous 10 Customers Worksheet</p> <p>List your previous 10 customers. Think about how you can increase the referrals you receive by helping your One-to-One partner understand how to find you more customers like these! Were these customers in a certain kind of business or market? Were these customers in a specific position that you are targeting? Are there other specific companies that you are targeting that are similar to these?</p> <p>Previous 10 Customers</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p> <p>7. _____</p> <p>8. _____</p> <p>9. _____</p> <p>10. _____</p> <p>Notes on Customers</p> <p>Where did they come from? What did you do for them? Are these average clients?</p> <p>Notes on Referrals</p> <p>What are other referral sources? What are good referrals? What are "bad" referrals?</p> <p><i>Note: Some professions have confidentiality requirements, if you are in one of these professions you can describe the "qualities" or "characteristics" that make your best customers your best customers</i></p> <p>Copyright © 2016 BNI Global, LLC</p>
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1-to-1 Meeting Preparation Form

My Name:

Met With:

Date:

1. What did I learn from my partner's BIO sheet? How does this help build credibility?
2. From the **GAINS** sheet: What are the member's business and personal goals for this year and beyond? How can I help my 1-to-1 partner accomplish some of these goals?
3. From the **GAINS** sheet: What business and personal networks is this member connected to which I can benefit from? How and why?
4. From the **CONTACT SPHERE** sheet: What professions are good sources of business for this member?

5. Who do I know in these professions (from question #4)? Am I willing to set up an introduction?

Name	Profession	When/How will I set up an intro

6. From the **Best 10 Customers** worksheet: What is my 1-to-1 partner's target market?
7. What is happening to someone's life (Business to Consumer) or business (Business to Business) which triggers them to need this member's product or service?
8. When I run across someone with this situation or need, how do I plan to bring this member up in conversation?
9. What is my specific plan to promote the member and the member's business?



Biography Sheet

Revise your Biography Sheet every six months.

Date:

Name	
Business Information	
Business Name	
Location:	
Profession	
Years in the Business	
Previous Types of Jobs	
Family Information	
Spouse	
Children	
Pets	
City of Residence	
How Long?	
Personal Information	
Hobbies	
Activities and Interests	
Burning Desire	
Something no one in this chapter knows about you	
The Key to Your Success	



GAINS Exchange

Name: _____ Date: _____

How well do you know the people in your network? Chances are you have a little work to do. Spend more time with the people you already know and concentrate on learning these five essentials. Make sure you give back the same kind of information. The more they know about you, the faster your name will come to mind when an opportunity arises in which your products, services, knowledge, skills or experience might play a part.

Goals

Goals are the business or personal objectives you want or need to meet for yourself or the people who are important to you. You need to define your goals and have a clear picture of the other person's goals. The best way to build a relationship with someone is to help them achieve their goals!

Goals (personal & business)

Accomplishments

People like to talk about the things they are proud of. Remember, some of your best insight into others comes from knowing what goals they have already achieved. Your knowledge, skills, experiences and values can be surmised from your achievements. Be ready to share your accomplishments with the people you meet.

Accomplishments (personal & business)

Interests

Your interests can help you connect with others. Interests are things like playing sports, reading books and listening to music. People like to spend time with those who share their interests. When you and your referral source share the same interests, it will strengthen your relationship.

Interests (personal & business)

Networks

You have many networks, both formal and informal. A network can be an organization, institution, company or individual you associate with.

Networks (personal & business)

Skills

The more you know about the talents and abilities of the people in your network, the better equipped you are to find (and refer!) competent affordable products and services when the need arises. And when you're trying to round up business opportunities, the more people know about your skills, the better your chances.

Skills (personal & business)



GAINS Exchange - Plus 3

Name: _____ Date: _____

These GAINS +3 topics help you share information that will help the people in your network be able to better identify referral opportunities and to have key stories to share to help turn those opportunities into referrals. Take a minute and intentionally consider what to share in each of these topics.

Bragging Points

Two sentences of what you want us to say to get you in front of a prospective client. Consider success stories of how you've helped others that are like the new clients you would like to be introduced to.

Bragging Points

Key Situations

What do I look for as a trigger to bring you up in conversation? Examples: 1) storm comes through (roofer, tree service, restoration,...); 2) engagement/wedding (venue, baker, caterer, DJ, ...)

Key Situations

Golden Goose Referral Partner

A referral partner that feeds you on a consistent basis. Examples: 1) Realtor (mortgage, title, security system, pest control, HVAC,...); 2) Insurance (roofer, plumber, glass, restoration,...)

Golden Goose Referral Partner



Contact Sphere Planning Worksheet

Contact spheres are businesses or classifications that naturally provide a source of referrals for one another. They are in somewhat related but non-competing businesses. Businesses in a contact sphere have a symbiotic relationship in that they support and enhance one another.

Contact Sphere

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

Contact Sphere Top Three!

What three professions round out your contact sphere?

(what professions are missing in your chapter?)

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!"

This worksheet works best in a business-to-business environment when requesting a personal introduction to a referral source, contact sphere profession or a business as your target market. In a business-to-consumer environment, consider requesting a personal introduction to a referral source in a specific profession who would be able to introduce you to your ideal customers because they come in contact with them all day, every day.



Best 10 Customers Worksheet

List your previous 10 customers. Think about how you can increase the referrals you receive by helping your One-to-One partner understand how to find you more customers like these! Were these customers in a certain kind of business or market? Were these customers in a specific position that you are targeting? Are there other specific companies that you are targeting that are similar to these?

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

Notes on Customers

Where did they come from?

What did you do for them?

Are these average clients?

Notes on Referrals

What are other referral sources?

What are good referrals?

What are "bad" referrals?

Note: Some professions have confidentiality requirements; if you are in one of these professions you can describe the "qualities" or "characteristics" that make your best customers your best customers

