



One-to-One Planner

*Get to Know Your Members and
Increase Your Referrals*

Use this One-to-One Planner to plan and conduct your One-to-One meetings. Keep original copies of your worksheets, ready to email to the person you will meet with next. The worksheets you can use include the Member Biography Sheet, Contact Sphere Planning Worksheet, GAINS Worksheet and Last 10 Customers Worksheet.



One-to-One Schedule

Be Systematic, Get to Know your BNI Members and Increase Your Referrals

	Date/Time	Partner	Location
Week 1			
Week 2			
Week 3			
Week 4			
Week 5			
Week 6			
Week 7			
Week 8			
Week 9			
Week 10			
Week 11			
Week 12			
Week 13			
Week 14			
Week 15			
Week 16			

The **One-to-One Schedule**, really just a way to schedule one-to-one meetings, is a great tool to use to get to know members of your chapter – outside of your regular meetings! The better rapport you have with each member, the more referrals you will both be able to give to each other. By systematically developing your relationships with each other, you will also be systematically developing your referrals in future meetings! Use the planner above to schedule your one-to-one meetings.

One-to-One Flow Sheet / Checklist

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

1	Set Time and Date	<p>~ Your office or theirs (preferred) ~ Their office, restaurant or coffee shop</p> <p>Pick a time to meet! It is better if you meet at your One-to-One partner's office because you can learn more about their business.</p>
2	Prepare Your Worksheets	<p>~ Bio Sheet ~ GAINS Worksheet ~ Last 10 Customers Worksheet ~ Contact Sphere Planning Sheet</p> <p>Take the time to prepare your One-to-One Worksheets. The worksheets will help you share important information with your One-to-One partner about your business and how to find referrals for you.</p>
3	Exchange Information Before the Meeting	<p>Email your four worksheets (above) to your One-to-One partner before your meeting. If you are meeting with many members of your chapter, keep the originals handy, and email them to the next person on your list a week ahead of time.</p>
4	Bring Worksheets to One-to-One meetings	<p>Bring the same materials to your one-to-one meeting that you faced or emailed earlier. You can also bring other materials that will help you help each other. For example, you can bring testimonials from your customers, or your business card holder to share if appropriate.</p>
5	Meet with your One-to-One Partner	<p>Meet with your meeting partner and learn as much as possible about how to find referrals for them. Use the worksheets as a way to get started.</p>
6	Commit and Agree on Goals	<p>~ One short-term referral ~ One long-term referral ~ Invite prospects from your meeting partner's "Contact Sphere Top 3" ~ Meet again</p> <p>Make a commitment to help your meeting partner 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 meet at someone's office, plan to meet at the other person's office next time.</p>
7	Record the One-to-One meeting on the BNI website	<p>Check with your Chapter's preferences – either the VP enters the meeting in the weekly PALMS entries, or if members do the entries themselves, update the website to record the one-to-one meeting.</p>



BNI Member Biography Sheet

Date:	
Your Name (speaker):	

BUSINESS INFORMATION	
Business Name:	
Business specialty:	
Location:	Years in Business:
Previous Types of Employment/Jobs:	

PERSONAL INFORMATION		
Spouse/Partner:	Children:	Pets:
Hobbies:	Activities of Interest:	Other:

OTHER INFORMATION	
My burning desire is to:	
Something no one would know about me:	
My key to success:	

BNI GAINS Worksheet

<p>Goals</p> <p>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.</p>	<p>Goals:</p>
<p>Accomplishments</p> <p>People like to talk about the things they are proud of. Remember, some of your best insights 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.</p>	<p>Accomplishments:</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 network source share the same interests, it will strengthen your relationship.</p>	<p>Interests:</p>
<p>Networks</p> <p>You have many networks, both formal and informal. A network can be an organisation, institution, company or individual you associate with.</p>	<p>Networks:</p>
<p>Skills</p> <p>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 roundup business opportunities, the more people know about your skills, the better your chances!</p>	<p>Skills</p>

How well do you know the people you want to include in your network? Chances are you have a little homework to do. Spend more time with the people you already know and concentrate on learning these five essentials – their goals, accomplishments, interests, networks, and skills. 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.

Contact Sphere Planning Worksheet

Contact Sphere		<h3 style="margin: 0;">Contact Sphere Top 3!</h3> <p style="margin: 0; background-color: black; color: white; padding: 10px; text-align: center;"> What 3 business specialties would help you round out your contact sphere (write them down in the space below) </p>
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
		Make a commitment to your One-to-One partner to help fill their Contact Sphere by inviting people to BNI that are in their "Top 3!"

Contact spheres are made up of business or business specialties that naturally provide a source of referrals for one another. They are somewhat related but non-competitive businesses. Businesses in the same Contact Sphere have a symbiotic relationship in that they support and enhance one another.



Last 10 Customers Worksheet

Last 10 Customers	Notes on Customers
	✓ Where did they come from?
	✓ What did you do for them?
1	✓ Are these average clients?
2	<i>Make notes in the space below about your last 10 customers.</i>
3	
4	
5	
6	Notes on Referrals
7	✓ What are other referral sources?
8	✓ What are good referrals?
9	✓ What are bad referrals?
10	<i>Make notes in the space below about referrals.</i>

List your last 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? Note: Some business specialties have confidentiality requirements; if you are in one of these business specialties you can describe the “qualities” or “characteristics” that make your best customers your best customers.