



**Welcome to the
2021/2022 Leadership Team Orientation**

**Breakout Room
MENTOR COORDINATORS**

Facilitated by:

Lannie Pullon, Executive Director BNI South Central Indiana
Daniela Torres, BNI Dynamo BC, Member Consultant

FACILITATORS



**Lannie Pullon | BNI Central Indiana
Executive Director**



**Daniela Torres | BNI Dynamo BC
Member Consultant**

**THANK YOU FOR
TAKING THIS ROLE.**

Your chapter needs you.

OBJECTIVES

.To **correlate** the value of the role of **Mentor Coordinator** with new **member retention** in the chapter.



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- .To **understand** the roles and responsibilities of Mentor Coordinator, Member Mentors, and Member Consultants.



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- .To reinforce BNI's **Core Value of Recognition** when new members achieve milestones.



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- .To **understand** the roles and responsibilities of Mentor Coordinator, Member Mentors, and Member Consultants.
- .To reinforce BNI's **Core Value of Recognition** when new members achieve milestones.
- .To provide the **tools to support new members**.



WHY PASSPORT TO SUCCESS?

. Average global 1st year renewal rate is ~45%



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WHY PASSPORT TO SUCCESS?

- Average global 1st year renewal rate is ~45%
- Research concluded **members leave** membership organizations because **they don't think anyone will notice.**



4 KEYS TO AN EFFECTIVE PASSPORT PROGRAM



Engaged

Mentor Coordinator



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4 KEYS TO AN EFFECTIVE PASSPORT PROGRAM



Engaged

Mentor Coordinator



Engaged

Chapter Mentors



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4 KEYS TO AN EFFECTIVE PASSPORT PROGRAM



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Mentor Coordinator



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**Ambassadors/
Member Consultants**



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4 KEYS TO AN EFFECTIVE PASSPORT PROGRAM



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Mentor Coordinator



Engaged

Chapter Mentors



Engaged

**Ambassadors/
Member Consultants**



Receptive

New Member



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NEW MEMBER ONBOARDING - CHECKLIST



- ❑ Select & train Passport Member Mentors that are good role models
- ❑ Welcome new members; participate in New Members Induction
- ❑ Pre-fill the Passport with chapter and participating members information
- ❑ Initiate Passport Program (& other onboarding activities)
- ❑ Explain the 30.60.90 Program (BC) MSP/Passport/QuickStart (Ind) South Central (Smart Start)
- ❑ New member check-in: Ensure they are progressing at a good pace
- ❑ Member Mentors check-in: Ensure they are engaged
- ❑ Coordinate with Member Coordinator
- ❑ Graduation with Celebration
- ❑ Inform Secretary/Treasurer when new member is eligible for Speaker Rotation
- ❑ Inform Regional Office when Passport is complete, to update Training History
- ❑ Update on new member progress during Chapter Success Meeting

PASSPORT MEMBER MENTORS

Roles & Responsibilities

1. **Contact new members** to schedule a Passport 121



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PASSPORT MEMBER MENTORS

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PASSPORT MEMBER MENTORS

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3. Conduct a quality 121, showing the new member how it's done



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PASSPORT MEMBER MENTORS

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4. Bring and demonstrate quality GAINS Profile, Bio, TOPS profile, 121 Planner



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PASSPORT MEMBER MENTORS



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Q: Who makes a good Passport Member Mentor?



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PASSPORT MEMBER MENTORS

Member Mentor #1 – President

President or former President



- Discuss the Leadership Team roles
- Review the BNI Weekly Meeting Agenda
- Discuss the expectation that all members serve on the Leadership Team
- Discuss weekly commitment that all members make



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PASSPORT MEMBER MENTORS

Member Mentor #2 – Vice-President

Vice-President or former Vice-President



- Discuss the BNI Policies
- Explain the PALMS Report and the Traffic Light Reports
- Explain how to register email address with Reporting2you.com



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PASSPORT MEMBER MENTORS

Member Mentor #3 – Secretary Treasurer

Current or former Secretary Treasurer



- Discuss completion of the Biography Sheet
- Discuss attending the Member Success Program prior to conducting a Feature Presentation
- Discuss how to pay chapter fees such as venue or breakfast fees, etc.
- Discuss how to submit a membership renewal when the time comes.



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PASSPORT MEMBER MENTORS

Member Mentor #4 – Membership Committee

Current member of the Membership Committee



- Explain the role of the Membership Committee
- Cover the Substitute Program – Who to use and how to prepare them
- Cover the Attendance Policy (General Policy #5)



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PASSPORT MEMBER MENTORS

Member Mentor #5 – Education Coordinator

Current or former Education Coordinator



- Discuss the importance of referrals versus leads
- Explain how to earn and record Chapter Education Unites (CEUs)
- Confirm if new member has access and knows how to access BNI Business Builder (Former BNI University)



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PASSPORT MEMBER MENTORS

Member Mentor #6 – 121 & GAINS

Use Mentor who does a high number of 1-2-1s

- Discuss One-to-One etiquette using the GAINS Exchange
- Discuss the One-to-One Meeting Planner



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PASSPORT MEMBER MENTORS

Member Mentor #7 – BNI Connect

Use Mentor who is great with BNI Tools

- Explain how to use the BNIConnect App
- Assist with enhancing their BNI Connect Member Profile
- Explain how to record and track their activity in BNI Connect



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PASSPORT MEMBER MENTORS

Member Mentor #8 – Gold Club Badge

Use Mentor who brings a high number of visitors



- Discuss importance of why and how to bring people to visit
- Discuss how each guest/visitor adds value to the other members



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PASSPORT MEMBER MENTORS

Member Mentor #9 – Visitor Host Coordinator

Visitor Host Coordinator or part of the Visitor Host Team



- Share that every new member will serve as a Visitor Host together with the Visitor Host Team during one meeting
- Meet with the new member to discuss the date and task



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PASSPORT MEMBER MENTORS

Member Mentor #10 – Local Trainings

Current or former Communications Coordinator



- Share details of upcoming local training's
- Share details of upcoming local BNI events for additional networking opportunities
- Show how to find and register for events on regional website
- Explain the value of the BNI Regional Weekly Newsletter



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KEY POINTS TO REMEMBER



- 1. Mentors should reach out to new members.**
- 2. Mentors need to lead by example.**
- 3. Mentors need to be available for 1-2-1s within the 10 weeks after induction.**

THE ROLE OF AMBASSADORS/ MEMBER CONSULTANTS

- **Work with Mentor Coordinators**
- **Support New Members**



They are the support system to the mentor coordinator and the Passport Program



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They help fill in the gaps, like a back up system



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They can help explain the traffic lights and the PALMS report.



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THE ROLE OF AMBASSADORS/ MEMBER CONSULTANTS



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3 MEETINGS WITH NEW MEMBERS IN THE FIRST YEAR

0-3 MONTHS: Support the completion of the 90 day program.

6 MONTHS: Follow up in any questions about their BNI experience.

6-9 MONTHS: If you were to renew today, would you? Looking for red flags.



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INDUCTION FOR NEW MEMBERS



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INDUCTION FOR NEW MEMBERS

- . Celebration and Recognition on a new member's first day
- . Include the Mentor Coordinator
- . Recognize the Sponsor
- . New Member Bio
- . Code of Ethics
- . Passing of the Virtual Passport
- . Social Media post in private FB group, public FB page
- . Mentor Coordinator arranges for a Breakout Room after the meeting



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WHAT HAPPENS BEFORE AND ON INDUCTION DAY?

Step 1

Mentor Coordinator is in good communication with the Membership Committee, who will let them know a new member has been accepted into the chapter.



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WHAT HAPPENS ON INDUCTION DAY?

Step 2

Mentor Coordinator reaches out to the new member:

- Welcome to the chapter
- You will be inducted, here's what to expect (Code of Ethics)
- Let's schedule our first passport orientation, which should happen right after your first meeting



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WHAT HAPPENS ON INDUCTION DAY?

Step 3

Still before the meeting

- Send new member the already filled out the virtual Passport
- Heads up to the mentors about the new member that they will need to reach out as soon as they're inducted



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WHAT HAPPENS ON INDUCTION DAY?

Step 4

Member is inducted during the meeting

- Celebration and Recognition on a new member's first day
- Include the Mentor Coordinator & Recognize the Sponsor
- Read the new member bio
- Code of Ethics
- Passing of the Virtual Passport
- Mentor Coordinator arranges for a Breakout Room after the meeting



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WHAT HAPPENS ON INDUCTION DAY?

Step 5

After Member is inducted

First Passport Orientation

- Mentor Coordinator meets with new member and goes over the chapter tools - performs meeting #7
- Talks about chapter standards



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TOOLS FOR MENTOR COORDINATORS



1. Electronic Passport
2. Tracking Spreadsheet
3. Certificate of Completion

All documents can be found in BNI Business Builder (former BNI University) and in www.bniltresources.com



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ELECTRONIC PASSPORT

PASSPORT TO
SUCCESS

BNI[®]

CANADA

PASSPORT TO
SUCCESS

BNI[®]

*United States
of America*



TRAINING HISTORY



Options ▾

Home NETWORK OPERATIONS REPORTS TOOLS ADMIN Envelope Search Print Help

Select Country ▾ Select Region ▾ Select Chapter/Core Group ▾

View Member:

Edit Email Me Back



Training History

Passport Complete : 24/07/2020

Member Success Program : 24/06/2020

All dates of completion and status can be found in BNI Business Builder (BNI University)



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PASSPORT GRADUATION



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Celebrate!



PASSPORT GRADUATION CELEBRATION

- . Passport Completion is a time to celebrate! Why?
- . Where in the Agenda
- . Feature Presentation
- . Notable Networker
- . Announcements
- . Invite the Regional Support Team
- . Invite Visitors
- . Present a Certificate of Completion
- . Individual and Group Photos
- . **Make it fun!** Trivia quiz about the new member, Q&A interview-style



PASSPORT GRADUATION CELEBRATION



PASSPORT GRADUATION CELEBRATION



CERTIFICATES AND GRAD CAP



CERTIFICATES AND GRAD CAP





BNI

Certificate of Achievement

FOR COMPLETING
THE PASSPORT PROGRAM

Chapter Name:

President Name:

Date:

A handwritten signature in black ink, appearing to read 'Dr. Ivan Misner'.

Dr. Ivan Misner
BNI Founder and Chief Visionary Officer

Q&A





Q&A

PLEASE SUBMIT 3 CEU'S FOR TODAY'S TRAINING!

*Thank
you!*

BNI

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