

# VISITOR Ideal Timing for Contact

The following timeline is suggested for best results engaging Visitors. Because contact with Visitors is often an indicator of motivation to apply for Membership, Visitor Host Teams can use this as a guide and best practice. Automated emails will be triggered and sent from BNI Connect when Visitors register, so you may choose to use text or phone calls instead of more emails.

## ***TWO DAYS BEFORE MEETING***

Check for registered Visitors. Email any who are listed with sample email in Five Steps document, also included here. Include You've Been Invited document in email. Texting and calling Visitors is a nice touch, as well.

## ***DAY BEFORE THE MEETING***

Designated Member email, text, or call Visitors to ensure they have proper time / place / link of meeting. See suggested talking points in this document. Consider making a call or sending a text rather than one more email.

## ***DAY OF MEETING, 30 MINUTES BEFORE OPEN NETWORKING BEGINS***

Visitor Hosts gather list of registered Visitors and arrive at meeting location / log into Zoom. Greet Visitors as they arrive, offering to introduce them to referral partners. If in person, be sure to greet Visitors as soon as they arrive and lead them to the registration table.

## ***DAY OF MEETING, START OF OPEN NETWORKING***

As everyone gets seated, ensure that Visitors are next to someone who will help them navigate the meeting. If on Zoom, encourage them to use and save the chat to make strategic connections. Also encourage Visitors to make a note of people they'd like to meet so you can facilitate introductions.

## ***VISITOR ORIENTATION***

Excuse Visitors to meet with Visitor Host. Explain importance of referrals in lead generation, offer to make introductions to strategic Chapter Members, explain time and financial investments, and offer opportunity to apply for Membership.

## ***WITHIN 24 HOURS OF MEETING***

Designated Member will call Visitors. This can be someone from the Visitor's Contact Sphere, the person who invited the Visitor, Visitor Hosts, President, or Membership Committee. Potential conversation elements are included in this document. This is CRUCIAL and can make the difference between a Visitor submitting an application or not.

## ***BETWEEN MEETINGS (OPTIONAL)***

Designated Member may want to call, text, or email qualified Visitors\* from the week before to invite them to another meeting if they have not filled out an application.

- \* Qualified Visitors are professionals whose category is not already represented in the Chapter and who could apply to join as a Member.

Dear {Visitor Name},

We're so glad you've registered to visit our Chapter! We're eager to meet you and hear about your business. To ensure your time with us is as effective as possible, here is some information for our meeting so you know what you can expect.

Here is when and where our Chapter meets:

Chapter Name  
Chapter Location or Zoom link  
Meeting Start Time

Here is some information you may find helpful in preparing for your visit:

- ★ We serve coffee / breakfast / lunch. (Include information about cost or logistics.)
- ★ After our Members give a 30-second presentation about their business and what an idea referral would be, you'll have an opportunity to do the same.
- ★ Tell us what you do and how we can refer to you.
- ★ Bring # business cards to share. (If in-person meeting)
- ★ At the end of the meeting, there's time on the agenda for you to ask questions and get information so you can determine whether BNI might fit into the current marketing strategy in your business.

Please let me know if you have any questions between now and the beginning of the meeting. We look forward to meeting you and showing you how BNI might help your business grow.

Sincerely,

President / Visitor Host Name

**DAY BEFORE MEETING PHONE CALL POINTERS:**

- ★ Set aside time on your calendar to make calls.
- ★ Ask if they have all the information they need for the meeting.
- ★ Confirm that they will be attending.
- ★ Ask if you can set up an introduction with a Member when they arrive.

Dear {Visitor Name},

Thank you for visiting our Chapter meeting today. We hope you felt welcomed and enjoyed the meeting. Someone from our Chapter will be following up with you later today or tomorrow to see if you have any questions, but if you are excited about the possibility of taking the next step to see if BNI can help your business, you will want to go through the application to get an idea of what Membership entails.

Here is a link to get started:

★ [Link to Regional website “Click Here to Apply Online” button](#) ★

Once you fill out your country and email, you'll get a link to begin the application process. I recommend having your 2 business references ready so you can finish it quickly. We're happy to walk you through it on the phone if you would find that helpful.

Thanks again for visiting! Don't hesitate to let us know if you have questions. We look forward to considering your application.

Sincerely,

Secretary / Treasurer Name

*“Thank you for joining our meeting today! We enjoyed getting to know a little about you and your business. We believe that our Chapter Members are the best referral partners to help you achieve your goals AND that you could help us achieve ours! We would love the opportunity to share with you how our Chapter can help you grow your business, how we are committed to each other’s success and our vision for the future. If you would like to continue this conversation, [click here to access the online application](#). When you complete the application, please email me so that our Membership Committee can set up a time to talk with you about how we can help each other grow our businesses. If you have additional questions, please do not hesitate to reach out to me.”*

*\*For a more valuable experience for our Visitors and to show the real power of BNI, we also suggest the person who invited them and a person in their contact sphere should follow up as well.*

*Sincerely,  
President Name*

### **POSSIBLE ELEMENTS FOR VISITOR FOLLOW-UP CONVERSATION:**

- ★ Let the Visitor know you’re glad they attended.
- ★ Ask if they connected with someone who might help their business.
- ★ Ask if they received the email with the link to an application.
- ★ See if they have questions about Membership or BNI in general.
- ★ Help them fill out the application should there be a need.

If the Visitor is not sure that it’s the right time to apply for Membership, it’s fine to let them know they can visit your Chapter again or another Chapter to get a feel for what it might be like.