

# VISITOR Experience Process

## *Inviting*

The goal of inviting Visitors to Chapter meetings is to introduce them to the proven system to increase their business. In the process, they may choose to do business with someone in the Chapter, tell others about their experience, or apply to join the Chapter. We strive to have excellent and consistent experiences for Visitors to all our Chapters. To that end, we've compiled some best practices Chapters can implement to ensure the best possible results from a visit.

## *Who?*

Anyone is welcome to a Chapter meeting to see and hear from Members as they showcase their businesses. The most strategic Visitors, however, are those who may potentially apply to your Chapter for Membership. Therefore, these professionals are the best choice to invite for Visitor Days, as substitutes, or simply to meet Members of your Chapter.

## *How?*

A natural, conversational invitation is often best when asking someone to visit your BNI Chapter. Asking them to meet a person rather than attend a meeting can be infinitely more appealing and more effective than asking someone to get up early and sit in a meeting! Visitors will invariably bring up the energy of a meeting just by being there, but the best experience will be when a Visitor has an expectation of meeting someone or learning something to help their own business.

## *Early in the Meeting*

As soon as Visitors arrive – whether in person or on a Zoom call – a Visitor Host should greet them and make introductions. Once a conversation begins and an industry is identified, a natural question might be, “Who would be a good referral partner for you?” Alternatively, the Visitor Host might suggest a person to introduce the Visitor to. For example, a wedding photographer might want to meet an event planner, florist, or caterer since they are all looking for brides. If Visitors have registered and a natural referral partner is identified, consider placing them in proximity to one another during the meeting. Visitor Hosts can proactively engage with Visitors to connect them to Members and answer questions they may have about the meeting. This way, a Visitor will relax and enjoy the meeting, knowing what to expect.

## *During the Meeting*

The focus of a Chapter meeting is to show Visitors how effective the BNI system is for growing business. Therefore, priority should be given to Visitors to alert them to the Chapter roster, the agenda, and other aspects of the meeting that are potentially confusing or impressive. This will ensure they have a positive experience and think favorably of the Members of your Chapter.

When the time comes in the agenda for Visitors to be dismissed, let them know that they will be able to come back to the general meeting to continue making connections. You may want to explain that the part of the meeting specifically for Visitors is designed to let Visitors know more about how BNI can work for their own businesses.

## VISITOR

# Experience Process

## Orientation Script

During the time of the agenda when Visitor Hosts take Visitors aside to explain next steps, we encourage Visitor Hosts to use this script / conversation. Visitor Hosts can customize to a degree, but we encourage Chapters to stick to the script as closely as is comfortable so all Visitors have the same experience. This part of the agenda should take about 10 minutes.

Thanks for coming today. I hope you made some connections or learned something to help your business. This time on the agenda is dedicated to letting you know what some options are for your next steps and to see if BNI is a good fit for you right now.

What did you like best about the meeting?  
*(Get answers from each Visitor.)*

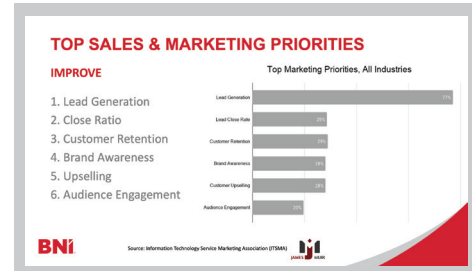
*[Testimonial Part 1 – What I appreciate most about being part of this Chapter is...short testimonial]*

Most visitors are interested in seeing how referrals might fit into their current marketing strategy. Would you like to see that? *[sure]*

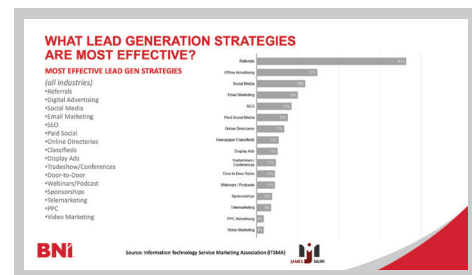
Let's start with what you're already doing. What are you currently doing to meet new clients and market your business?  
*(Ask each Visitor and get answers.)*

HOW IS THAT WORKING FOR YOU?  
WHAT KIND OF RESULTS ARE YOU GETTING?

*(ITSMIA Slide)* It's probably no surprise that lead generation – getting new clients – is the top priority for most businesses.

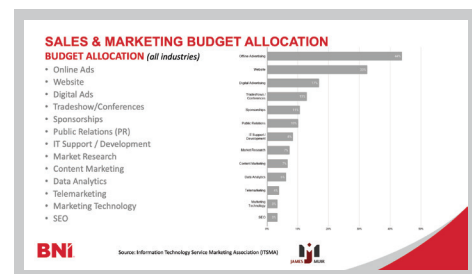


When we look at which lead generation strategies are most effective, we see that across all industries, referrals are, by far, the most effective strategy.  
*(Show "What Lead Generation Strategies Are Most Effective?" Slide)*



And yet, here's what's surprising: Even though generating new leads is the top priority for most businesses, very few companies invest time and money into generating referrals. They're just crossing their fingers and hoping for the best.

The key to meeting your goals in this area is to get intentional about it just like you do your other marketing strategies..  
*(“Sales & Marketing Budget Allocation” Slide)*



# Experience Process

## Orientation Script



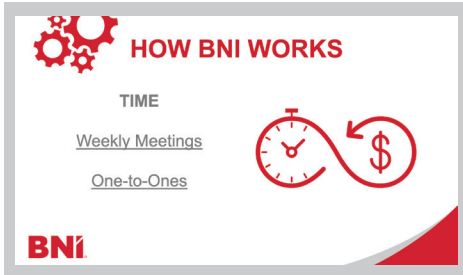
Many Visitors at this stage actually want to apply to the Chapter and set up some time to get their questions answered. If that makes sense for you, simply hold your phone's camera to this QR code for a link to get you started on the process.

If you need to crunch numbers or talk to someone at home or in your office, that's ok. Someone from our Chapter will call you in the next 24 hours to see if you have questions. And we can help you get registered if you'd like to bring them to another meeting.

[Testimonial Part 2 goes here - Specific Results in both time & money savings - effectiveness of referrals as a lead source for you. E.g. Before I joined this Chapter, I was doing \_\_\_\_\_ to market my business and it was \_\_\_\_\_. Now that I have these referral partners, I find that \_\_\_\_\_.]



**Has anyone already shared with you how BNI works?**  
 Usually, most visitors at this stage will want to know what it takes to get involved.  
**Does it make sense for me share with you how it works?**  
 Most of our visitors have questions about two considerations:  
**time and money, your 2 finite resources.**



First time. Our weekly 90-minute meetings are crucial in building the trust that generates referrals. We want you here. We mark out meeting time on our calendar just like we would a meeting with a client. When you treat BNI like your best client, BNI will become your best client.

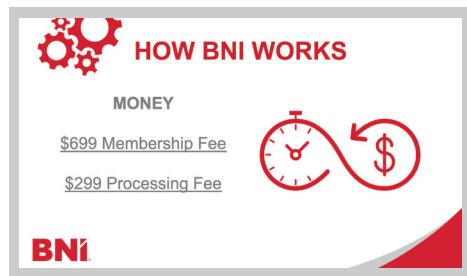
We all look forward to the opportunity to hang out with like-minded professionals, but we also know that life happens and we can't always be here, so we allow for 3 absences in a rolling 6-month period and the ability to send a substitute if something comes up.

Outside our weekly meetings, the real magic happens during what we call One-to-Ones. This is when two members meet to share a meal or coffee. In a One-to-Ones, I am going to learn your bragging points... what sets you apart from others in your industry. I want to know what key situations to look for and how to bring you up in conversation. I want to know what I can do to promote you on social media. These become referral strategy sessions when we actively help on another find our ideal clients. Nowhere else will you get this type of commitment that allows you to see an immediate return on your membership investment.

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Now money. The cost for the year of membership is \$XXX, in addition to a one-time \$XXX processing fee. It's not an application fee because it is not paid until you are accepted. There is not a fee to apply. Our Chapter also has a monthly fee of \$XX to help pay for coffee and the venue where we meet. For the time commitment and investment of a BNI Membership, nothing compares to the results our Members get from personal referrals.



Many Visitors at this stage actually want to apply to the Chapter and set up some time to get their questions answered. If that makes sense for you, simply hold your phone's camera to this QR code for a link to get you started on the process.

If you need to crunch numbers or talk to someone at home or in your office, that's ok. Someone from our Chapter will call you in the next 24 hours to see if you have questions. And we can help you get registered if you'd like to bring them to another meeting.

## Follow-Up

The most strategic time to capitalize on the excitement Visitors have concerning their Chapter experience is as soon as possible after the meeting ends. Within an hour or so of the end of the meeting, the person who invited a Visitor can call to see if the Visitor has questions and ask how their experience was. In addition, the President or someone on the Visitor Host Team or Membership Committee will want to follow up with each Visitor to be sure they felt welcomed and have the opportunity to continue filling out the application for Membership while their memories of the meeting are still fresh in their minds and they are imagining how BNI can work for their own businesses.

Possible elements for that follow-up conversation can include:

- ★ Letting the Visitor know you're glad they attended
- ★ Asking if they connected with someone who might help their business
- ★ Asking if they received the email with the link to an application
- ★ Seeing if they have questions about Membership or BNI in general
- ★ Helping 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.

## Remember...

Visitors are the lifeblood of the Chapter, bringing new energy and new business! They are our VIPs! Let's be intentional about helping them see the benefits of a BNI Members so we all can enjoy Givers Gain®!

# Experience Process

## ***Best Practices: Follow up***

Visitor follow-up is an essential ingredient in building successful referral partner relationships with Visitors. It is our opportunity to touch base after the meeting, let them know we would be interested in their feedback, and would like to get to know them better, potentially adding them to our referral partner/sales team.

The most successful Chapters follow up with every Visitor within 1- 24 hours of their visit. They thank the Visitor for attending, set a vision of what it means to be a Member of their team, ask the right questions, and invite them back for a second visit, if appropriate.

Who should reach out to the visitor?

- ★ Visitor Host - phone
- ★ President – phone or email (suggested template below)
- ★ Member in the Visitor’s contact sphere – phone\*

What should you say to the visitor?

- ★ What did you like most about the meeting?
- ★ Do you see the value of having dedicated referral partners for your business?
- ★ Could our referral partner/sales team help you achieve your goals?
- ★ How are you currently staying connected?
- ★ Do you have any additional questions?
- ★ Would you like to know how to apply to join our team?

The Visitors will be the ones to decide if BNI is a good fit for them and their business. But as Members, you can have a HUGE impact on the experience they have before, during, and after the meeting. If they have a GREAT experience, they are much more likely to apply to join and be your next referral source.

### **Sample President email – share a link to online app in body of email\***

“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.

# Experience Process

## *Visitor Contact Information and Follow-Up*

This form may be useful to have Visitors indicate their interest level. Once Visitors have filled out the form, they can indicate that they've done so and be entered to win a weekly giveaway like a \$10 gift card.

Thank you for attending the meeting! Please provide your contact information:

First Name

Last Name

Email Address

Phone Number

Please specify which BNI Chapter you visited:

Based on your experience, would you say...?



- I am ready to apply.
- I have some questions and would like further clarification.
- I am unable to join this chapter and I would like to visit another.
- I am not interested in joining at this time.