ROLES

CHECKLIST

CHECKLIST FOR PRESIDENT

Previous day

Reminding the Team:

Educational Co-Ordinator - Topic and speaker ready ST reminded of door prize and bio sheet.
ST that he has arranged the Projectors for 8 mins presentation flipchart, marker pens etc. ,
Check with MC/ Induction coordinator that the induction kit is ready with him
Edu coordinator- Review the topic and ensure speaker is ready.
Have backup if speaker is absent LVH - Visitors and members signing sheet ready
Check with the MC that sufficient application forms are available with them. Update the meeting
Script appropriately with latest statistics.

CHECK THE STATUS OF:

Application
formsInduction
Kits
Special badges, labels
pins Roster List
Mementoes for winners
Networker certificates

Check with ST that the members doing 8 mins are reminded of door prize and bio sheet. Check
with ST that he has reminded the LVH of the visitors and members signing sheet. Check with the ST
that he has arranged the Projectors for 8 mins presentation. Check with the MC that sufficient
application forms are available with them. Update the meeting Script appropriately Revise the
roster weekly

On the day of Meeting (before the meeting)

Network with all visitors Get the list of visitors before the meeting starts Get the list of
substitutes and absentees. Ensure that event coordinator to announce the forthcoming events.
Visiting Card folder is duly filled Ensure time keeper ready. Ensure the bio sheet of new inductee
is ready Ensure the induction kit is ready with pins outside. Ensure wrapped door prize is on the
table Ensure the trophies won by the chapter is on the table. Ensure substitute has his 30 second
script ready and has done the practice.

During the meeting :

Start the meeting on time. Strictly stick to the script only and do not add any extra script. Introduce the visitors individually when number of visitors are between 1 to 15. During the 30 seconds explain what is "GIVE"

"for the benefit of visitors when a member says my give is .. it means he personallyknows that person and anybody needs that contact he can connect you"

Ensure 8 mins speakers completes on time. If the speaker over shoots the time standup and give him a hint, if it still continues " say thank you" Allot 30 to 45 secs for the Bio sheet of the member doing 8 mins. Ensure absentees name is not called during the meeting.

**Tips to complete the meeting on time on MVD
 or when there are more than 15 visitors**
Chapters with more than 60 members and large visitors start the meeting 10 minutes before.
Do not call out the names of visitors individually. Let the member introduce the visitor at the time of referral passing section.

Do not call the names of person one by one for 30 seconds presentation, instead let the members stand up on their own and do it swiftly. Do the same for referral passingsection. **Note: if any member is absent or the member does not have any visitor orany referral the President shall call out the next member**

<u>Immediately after the meeting:</u>

Check ST and MC update the visitor's entry and Palms before 2pm on the sameday.
Share the chapter stats of the day with the Support director.
Ensure MC team sends application form to BNI office.
Ensure Mentors are mentoring the new inductees for next 12 weeks.

POWER TEAM COORDINATOR

- **Formation of Power Team**
    - Members for whom the end client is the same.
    - Identify captain & vice-captain for each PT
    - Team size of 6 to 10
    - Allocate the new members to the respective PT
- **Coordinate with PT captains for regular PT meetings.**
    - Meeting once in 15 days preferably
    - Ensure that all the captains announcing the statistics of their team at the BNI weekly meeting.
    - Motivate PT captains to keep posting about their PT activities in the main Wats-app group.
    - Keep appreciating all the appreciable points.
    - Visit PT meetings.
- **Tracking weekly**
    - Attendance
    - Referral Initiations
    - Visitor Initiations
- **Meeting Agenda**
    - Prolonged presentation of Weekly presentation
    - Discussion on Clients
    - Discussion on recent orders
    - Discussion on prospects
    - Discussion on probable Power Dates
    - Plan for the next PT meeting
- **Team competition**
    - Criteria for competition
    - Tracking progress of competition

CHECKLIST FOR 121 CO - ORDINATOR

Before meeting

1. Prepare 121 Goals for the chapter for 6 months. Break it down into monthly and weekly goals
2. Motivate members to do more effective 121s for more referrals and business
3. Using summary palms report, track the number of 121s done by the members
4. Prepare an excel sheet to track the number of 121 done among the members and set Goals for the members
5. Push members to do 121 within and outside their power teams and contact sphere
6. Keep-a-note of the total 121s done by the members for the week prior to the meeting and the referrals passed.
7. Arrange for at least two 121 conclaves during the term of 6 months
8. Talk to members with poor 121 score to understand their pain points
9. Sit with new members and explain the concept of 121 and its benefits
10. Motivate members to attend 121 training workshops
11. Remind members to post their 121s in BNI connect

On the Meeting Day

1. Appreciate members who have done effective 121s and passed referrals
2. Check if members are declaring the posted numbers of 121 during the meeting
3. Announce Goal vs Achievement on 121s for the week and month

After Meeting

1. Appreciate members who had achieved their 121 goals
2. Appreciate members who have committed 121s for next week
3. Update the tracker sheet and share the new targets with the members

EDUCATIONAL   CO - ORDINATOR

The Education Coordinator plays a key role in educating chapter members,visitors, and guests on BNI networking topics.

- Works with the chapter President and Vice President to come up with BNI related topics and themes

- Reviews and recommends: BNI Podcasts, Walker This Way Videos, BNI Business Builder courses for members to watch, listen and learn from

- Coordinates a 3-5 minutes Education Moment each week.

- Completion of role specific training in BNI Business Builder and attend LT orientationprior to taking on role

- Lead by Example

- Signing of applicable Leadership Team Agreement(s) prior to taking on role

CHECKLIST FOR EVENTS AND TRAINING COORDINATOR

WHY?

- Member retention is directly proportional to attending Training.

- Bonding builds Trust; Trust is a precursor to business. Socials Develops Bonding

- Only place where you can meet other new and seasoned members

- Referral Session in all the training – Go get your Dream Referral

- Option of referring you members to the attendees of the training

Before the Meet:

- Part of the Training Co-Ordinator Wats-App group- To follow up the training calendar for the month.

- Create a folder in Google Drive and record testimonials from the members who have attended the training. Post in your Business Group to promote the Training

- Please be clear about the Venue and Timings and whether breakfast or lunch served.

- Prepare Teasers and promotional messages, Videos and Pictures and Promote the whole week.

- Go to BNI connect, under Chapter Tab, click Training Report and get details of the training Report, Member Wise and Training Wise.

- Get associated with the go-green coordinator to see who can attend training to increase their points.

During the Meet:

- Do not read it from the Phone during the Meet

- Prepare a 30 seconds creative script to promote the activity or Training.

- Highlight the Benefit of training and how it may help him.

Clearly highlight the VENUE, Timings and the duration of the training

Remember:

- 2nd Saturday is MSP day

- MSP is for all New Members and compulsory of Renewing members.
  (Renewing members should do it with in two months from their renewal)

- There is a total of 10 trainings

- MSP, Referral Skill, Presentation Skill, Power Team, Connect, Leadership, Advanced

- Weekly Presentation, Adv Referral, Adv 121, Feature Presentation,

- Traffic Lights – More than 3 Training in 6 months. i.e., One Training in two Months.

- Substitutes are welcomed to the training.

- Trainings are Free to DNA members and Gold Club Members.

CHECKLIST FOR BNI CONNECT COORDINATOR

- Profile
- Referrals
- 121s
- Thank you notes
- Visitors
- Testimonials
- CEU
- PALMS
    - Summary Report
    - View Summary
- Traffic Lights
- Referrals Tracking
- Slips
- Membership Dues
- Search
- Connections
- Groups

CHECKLIST FOR GO GREEN COORDINATOR

Before the meeting:

1. Get the traffic light score of all the members every month
2. Communicate with individual member over WhatsApp/phone about their traffic light rating that month.
3. Explain how the traffic light can be improved to attain go green status
4. Do a 121 with members in grey, red amber and make sure they are motivated to move to green.

During meeting:

1. Once a month do a coordinator report (after approval from LT) and appreciate members who have moved up in traffic lights.
2. Recognize new green members by making LT or SD pinning the green pin.
3. Mention members who with little effort can move to Green in the next month.

After the meeting

1. Speak to LT and get the traffic light data
2. Work strategy to move all members to Green.

Leadership Team Meeting
Monthly Meeting Agenda

This is an outline of the topics that Leadership Teams should cover at every monthly meeting. There will usually be current ad-hoc issues that the team will need to discuss.

Chapter Name _____ **Meeting Date** _____ **Submitted by** _____

1. **Discuss the Chapter's Goals** for the numbers of members, visitors and referrals.
   Evaluate the progress achieved toward meeting these goals
   Discuss other activities or steps that the chapter will take toward meeting these goals

   Record progress of the chapter toward meeting these goals here:

Goal for month of _____	**Target**	**Result Achieved**
No. of **Members** in Chapter	_____	_____
No. of **Visitors** in month	_____	_____
No. of **Referrals** per member per week	_____	_____

2. Update the **recruiting priority list** of the **Chapter's most-wanted 5 business categories.**
   Have the Membership Committee announce the most wanted list as part of the weekly Membership Committee report. E-mail this list to your BNI Director.

3. The **Vice President should circulate the last membership committee minutes** and **summarize their decisions/actions** relating to: applications, pending renewals, member participation, contentious disputes, etc.

4. The **Secretary/Treasurer** should provide a brief update on the current position of the **chapter funds.**

5. **Other Issues discussed:**

   _____
   _____

6. **Any concerns of the Leadership Team:**

   _____
   _____

7. Action required by BNI Director:

Please fax this form to your BNI Director within 24 hours of the Leadership Team Meeting

WEEKLY LT CALL AGENDA AND REPORT

REGION:

CHAPTER:
DATE:

Members Present
RD...Yes/No
CD...Yes/No
MC:.. Yes/No
ST... Yes/No

1.One Good thing about today's Meeting:CD:
 MC:
 ST:
 RD (If attended):

2.   Meeting Stats:
Visitors:
Referrals -
TYU Note –
Absent –
Substitution –
Inductions-
Drops –
Current Membership:

3. Improvements:

4. IPA – Power of One:

5. How can I help you:

6. What did you like most about this call:

CHECKLIST FOR VICE-PRESIDENT

Before the meeting

Ensure chapter meeting script is revised

Update the recent stats in the membership

committee report

Fill in the top 5 vacantcategories section

Inform the coordinator who is giving the committee report (each week one coordinator under him)

Decide on the policy of the week to be read out and be prepared with

relevance to the week and issues in the chapter.

Any other specific urgent issues / complaints, inductions to be approved by

committee and call for specific meeting if required.

Keep all stats print out in hand for every meeting and address relevantcoordinator

during the meeting.

Review traffic lights of the chapter of members. Inform traffic light coordinator to help members move to

green.

During the Meeting

Note down the stats of the meeting in terms of Referrals, TYCB, 121, testimonials

Ensure members read the referral passed online only. Have BNI connect open in front of you for verification.

Make note of members with highest referral, highest visitor, best 30 second

other parameters depending on chapter like highest 121s, testimonials, best PT

Sum-up and announce the stats during the stats of the week section along with

door prize (ensure with ST the door prizes are there)

Choose or modify the vacant categories based on visitors present atthe

meeting Take the sheet of registration table (for absent, substitute,

time etc.,)

Go through the application forms received and hand over to application review and GOLI

team. During new induction ensure a bio sheet, sponsor name is ready for President.

Check availability networkers' certificate, blank application forms, induction kits,

blue badges, black badges if any etc to be monitored with relevant coordinator

After the Meeting

Submit the palms by filling in the attendance, testimonials and approving the visitors

List down member in 3rd absence and send control letters sent (plus other control letters/calls) Follow up with growth, referral, Application review, Attendance, Mentor

Fill in the goals vs achieved sheets for all co-ordinator's and address if any delay Send stats of the week to Support director immediately after the meeting Send all application forms to the BNI office (or get sent)

Any other relevant issue, problem in the chapter faced to be addressed

CHECKLIST FOR ATTENDANCE COORDINATOR

Before Meeting

1. Create teaser for upcoming meeting
2. Post in the WhatsApp/Telegram group, and also send personal message to all members
3. Take a list of 2nd & 3rd absentees and inform them about the attendance policy and ensure that either they come or send qualified substitutes
4. One day prior to meeting follow up with all members through personal messages and once again call & remind 2nd and 3rd absentees.
5. Keep soft copies of all control letters and relevant reply to letters with trail for future reference. (Will be very useful when dispute arises)

On Day of Meeting

1. Manage member registration desk – Sign in sheets with in-time.
2. After the meeting cut-off time mark the late comers as LATE and address them after the meeting in person.

After the Meeting

1. Note down list of Absentees and Substitutes.
2. Call up absentees and find the reason for absence and address them appropriately.
3. Take a list of 2nd and 3rd absentees and have a personal talk to them about the control letter to be issued and send them the control letter marking copies to Leadership Team, MC members, Support DC, BNI office (Aishwarya) and ED.
4. Issue Open classification letter and Drop letter for **4th Absence** after having a personal call with them, and after discussing with the MC members. Mark copies to all the people mentioned above.

MC Meeting

1. Generate the "PALMS Attendance Report" and prepare a list of people in 1st, 2nd, and 3rd Absence.
2. Against each member in the above list write down the summary of discussions with the member and how it has been addressed with the member.
3. Prepare a list of frequent late comers and against each member write down the summary of discussions with them.
4. Generate the "ABSENCE REPORT" to identify high substitutions by members for the rolling period
   - of 6 months and summaries the issues and the action taken.
5. Prepare a list of members dropped in the previous month if any

CHECKLIST FOR APPLICATION REVIEW

The Role of Application Review

1. Has the copies of the visitor applications
2. After the initial visitor interview and on Membership committee's approval visits the visitor's office to check on his credibility. He explains the policy, procedures and the commitment required to join BNI.
3. On acceptance collects the cheque on behalf of BNI office and hands it over to BNI office.
4. He maintains a tabulated details of all the visitors attended and their status.
5. He makes a weekly review on the list of visitors and makes the necessary follow ups
   a. A follow up call.
   b. Gives reminder call to interested persons who are willing to join on a later date.
   c. If required meets them in their office.
   d. Asks the sponsor to speak to the visitor to close the visitor at the earliest.
6. At the MC meeting gives the update on his tabulated visitor details.
   a. The number of visitors converted
   b. The number of visitors who are still in pipeline
   c. The number of visitors who have declined
   d. The number of visitors who we have declined and the reasons behind it.
7. It is his duty to update the Membership committee on the quality of visitors to the chapter.
8. He checks with members for any potential category conflicts.

CHECKLIST FOR CHAPTER GROWTH COORDINATOR

1. The chapter growth coordinators are responsible for motiving the members to bring visitors for the meeting

2. For this they have identify the members who can bring in open category's visitor

3. Identify members who can bring visitors those can give members good business

4. Their role is not only increase in members count but increase in business of the members

5. They should always work with Applications reviews of chapters in closing the visitors

6. This allows the chapter growth to get the contact sphere of the new inducted members also

7. He must be aware of all the open categories in chapter so that he promotes in groups

He should be updated with the number of members the fellow members have sponsored so that he canhelp a blue badge member to black badge

CHECKLIST FOR MENTOR COORDINATOR

Mentor Coordinator is responsible for the new member experience and engagement.

1. Ensure that each new member is enrolled and engaged in the BNI Passport Program

2. Assigns 10 Member Mentor roles and ensures that each Member Mentor is reaching out to the new member in a timely manner (not the other way around)

3. Consistently communicates with the chapter BNI Member Consultant

4. Communicates with the chapter President and MC regarding new members being inducted

5. Attends the first half of the monthly Chapter Success Meeting

6. Completion of role specific training in BNI Business Builder and attend LT orientationprior to taking on role

7. Lead by Example

8. Signing of applicable Leadership Team Agreement(s) prior to taking on role

CHECKLIST FOR REFERRAL VALUE COORDINATOR

1. Check for the quality of Referrals by proper entry of data.

2. Review every week the referral slips passed for quality.

3. Every week, pick (carefully) two slips to check for name, no's & whether they wereexpecting their call and whether there is a Business Opportunity.

4. The process must ensure that EVERY member follows proper referral process.

5. Promote the BNI Connect for online so that referral quality will increase.

6. Promote the concept of Self Referrals to be passed only after closure of Business with the Chapter members.

7. In case of members passing large number of Referrals, to focus whether the same are Quality Referrals.

8. To call for the Purchase Order/Invoice Copy/ Work Order, in case of Thank you slips beyond Rs. 10 Lakhs. Please verify the authenticity of the same. In case of any doubt, please bring the same to the knowledge of the Head Table.

9. Responsible for 100 % ONLINE & Chapter Revenue.

CHECKLIST FOR SECRETARY TREASURER

Before the Meeting

Preparing the List of 8 Minutes Speakers for the month

Ensure the speakers have attended MSP

Assign the speakers in the order of seniority of joining the chapter

New members to be given chance based on attendance, participation & other criteria. New members to be given 4 minutes initially.

Inform the speaker that if any change in the slot is done. He has to wait for his next turn Have back up speaker if speaker becomes absent suddenly Assign one Power Team Presentation

Have a backup of door prizes and other prizes for special occasions

Following up with Feature Presenter (8 minutes speaker)

Reminder Mail to the 8 mins speakers (for the next 2 weeks) - send it personally

Get the presentation script and review it. Get help of ED- Biju Chandran if requiredSend reminder message for wrapped door prize

Obtain bio sheet of the feature presenter as per the format only Ensure that the speaker bring a sheet for members to fill their referralsafter the presentation is over

Check stock of

Induction kits, forms., badges and stationeries

Display kits- BNI books etc.,

Coordination with Lead Visitor Host

Collect visitors data and special care on Mega Visitor data

Identify the member who will do Visitor Orientation

Backup person for visitor orientation in case of absence.

Review the GOFIs and GOLIs in terms of performance.

CHECKLIST FOR LEAD VISITOR HOST

Before Meeting

- Have monthly LVH Team Meeting

- Remind all FIT, BIT,LIT one day before meeting to come early to the meeting by **6.45 A.M.** in full formal dress code.

- Check and order sufficient Application Forms through ST to BNI Office.

- Check and order sufficient Visitor Badges through ST to BNI Office.

- Ensure Registration Desks for Members and Visitors Registration are planned.

- Ensure **Sign in Sheets** for Members and Visitors are planned.

- Print and keep few Cash Receipt Forms for Visitors in case they ask receipt for the meeting fee paid by them.

On the Day of Meeting

- Arrive at Meeting Venue by **6.45 A.M.**

- Check if Meeting Hall and seating arrangements are in order and sufficient.

- Setup Members and Visitors Registration Desks with **Sign In Sheets, Visitor Badges and all Display Books and Materials.**

- Position 2 FIT near the **Hotel Main Door** or Lobby to warmly welcome Members andVisitors.

- Position 2 FIT at Visitors **Registration Desk** to register Visitors, collect 3 BusinessCards and write out Visitor Badges.

- Position 2 FIT at near Registration Desk to **takeover Visitors** after Registration.

- Inform 2 BIT to be ready with **Application Forms** before meeting starts.

- Ensure **NO Visitor is left alone** during the Open Networking Session.

- Pass **one set of Business Cards** of Visitors with Sponsor Name to LT Table before start of Meeting with Visitor Sign In Sheet with **OPEN CATEGORY HIGHLIGHTED.**

- Sit next to Visitors and guide them understand Meeting Flow, Roster, Feature Presentation Etc.,

CHEKLIST FOR FIT, BIT, LIT

FIT – First Impression Team

1. Arrive at Meeting Venue by 6.45 Am

2. Meet and Greet the Visitor in the Hotel Lobby

3. Help the Visitor with the Registration process

4. Make sure that No visitors are left alone during the meeting

BIT- Best Impression Team

1. Arrive at Meeting early

2. Interact with all the visitors

3. Try to connect few visitors with our members so that Referrals can be passed

4. Run a fantastic BNI Meeting and give a WOW meeting to the visitors

LIT- Last Impression Team

1. Help Visitors submitting the EOI Forms

2. Guide them through the process of submitting the form

3. Assist them to the breakfast area

4. Give them goodie bags if u any

5. Be with them till they leave the meeting hall

CHECKLIST FOR FEATURE PRESENTATION COORDINATOR

1. What is the importance of feature presentation, what are the benefits

2. Keeps record of past featured presentations to ensure every member gets equal benefits.

3. Ensures minimum next 6 weeks booking of presentations.

4. Ensures to have seasonal business presentation on board at right time.

5. Ensures to get presentation received on time to LT by email for review and approval.

6. Coaches and guide members for effective presentation.

7. Motivate members not taking featured Presentation due to personal reasons.

8. Ensures all members understand benefit of featured presentation.

9. Motivate members attend Featured Presentation work shop.

10. Prepare Education slot for benefits of featured presentation and be ready as and whenasked for by your LT or Edu Co-Ordinator.

CHECKLIST FOR WEEKLY PRESENTATION COORDINATOR

1. The coordinator has to check whether all members have their 30 seconds prepared

2. They also should check whether they do follow any meeting stimulants for the week

3. They also must make sure that members don't present the same 30 seconds again

4. They have to plan different meeting stimulants to be planned for the coming weeks

Renewals Checklist

Process

1. The Membership Committee meets to discuss the renewal **120 days** ahead of renewal date (as per BNIConnect).
2. Two members of the Committee then discuss the outcome with the renewing member.
3. The form is signed off by all present and the situation is reviewed each month until renewal is received(30 days prior to renewal date on BNI Connect).

Member Name:

Participation Record:

	UNACCEPTABLE	POOR	ACCEPTABLE	EXCELLENT
CATEGORY ISSUES				
ATTENDANCE				
REFERRALS				
VISITORS				
TRAINING				
CHAPTER POSITIONS HELD				
POSITIVE ATTITUDE				

Comments:

Membership Committee Decision

	UNACCEPTABLE	POOR	ACCEPTABLE	EXCELLENT
OVERALL OUTCOME (X)				
DECISION	Decline Renewal	Renew with Conditions	Renew	Renew
NOTES	Discuss with BNISupport Director before approaching member	Approach member after meeting and clarify specific improvementsneeded for renewal to beapproved.		

Note:

If the Committee is still undecided, seek guidance from your BNI Support Director. A Committee may renew amember they are unsure about with specific conditions attached. If

the member accepts these conditions andfails to comply with these conditions, their category should then be opened.

Committee Member 1:   **Name:**   **Initials:**

Committee Member 2:   **Name:**   **Initials:**

Renewing Member: **Name:**   **Initials:**

BNI Director (Approval):   **Name:**   **Initials**