

GOAL SETTING SESSION

Chapter Goal Setting with Mechanisms in BNI Connect:

Utilizing BNI Connect® to enter and track Chapter Goals is an important path to member's success. When gain access to these pages, please navigate to Operations > Chapter > Manage Goals > Enter Chapter Goals. BNI Connect® will track the actual results. All members will have access to view the goals as well. We have a worksheet below to use for today's exercise.

Take 30-Minutes and create the Chapter Goals for the next six months. Take a look at the Chapter Report for your starting point. Enter the goal and then list the mechanism to use to hit the goal. There is also another helpful resource for entering chapter goals:

<https://support.bniconnect.com/hc/en-us/articles/219067197-Manage-Goals-Enter-Chapter-Goals>

GOAL SETTING FORM

[Type Vision Here]						
Mission Statement						
[Type Mission Statement Here]						
	10/2020	11/2020	12/2020	1/2020	2/2020	3/2020
Goal	%	%	%	%	%	%
Actual	%	%	%	%	%	%
Mechanism 1						
Mechanism 2						
Goal	0	0	0	0	0	0
Actual	0	0	0	0	0	0
Mechanism 1						
Mechanism 2						
Goal	0	0	0	0	0	0
Actual	0	0	0	0	0	0
Mechanism 1						
Mechanism 2						
Goal	0	0	0	0	0	0
Actual	0	0	0	0	0	0
Mechanism 1						
Mechanism 2						
Goal	0	0	0	0	0	0
Actual	0	0	0	0	0	0
Mechanism 1						

Mechanism 2						
Goal	0	0	0	0	0	0
Actual	0	0	0	0	0	0
Mechanism 1						
Mechanism 2						
Goal	0	0	0	0	0	0
Actual	0	0	0	0	0	0
Mechanism 1						
Mechanism 2						
Goal	0	0	0	0	0	0
Actual	0	0	0	0	0	0
Mechanism 1						
Mechanism 2						

BNI Resources

BNI Atlanta Website: www.bniatl.com

BNI Atlanta Website Resources: <https://bniatl.com/en-US/resources>

- [New Member Resources](#) – Information for our BNI new members
- [Member Resources](#) – General Information and Docs for every BNI member
- [Leadership Team Resources](#) – Success Meeting Link, Facebook Editors, Branding, Documents, Timers, etc.
- [Membership Committee Resources](#) – BNI Interview Questions, Accountability Letters, etc.
- [Education Coordinator Resources](#) – Great content to deliver to your Chapter
- [Visitor Host Resources](#) – Visitor Experience Process, Visitor Orientation, Sign-In Sheet, Videos, Scripts, etc.
- [Mentor Coordinator Resources](#) – Mentor Worksheets, Mentor Passport Materials, Interview role info to cover during Passport One-to-Ones.

BNI Business Builder – BNI Documents, Content and 10's of thousands of hours development training

BNI Podcasts: www.bnipodcast.com

BNI YouTube:

- [BNI TV - Headquarters Channel](#)
- [BNI Connect](#)
- [Much more...](#)

BNI Connect Support – [BNI Resources Center](#)

POSSIBLE GOAL MECHANISMS

for each Benchmark or Success Driver



Attendance

- Education on importance of - WHY from EC and MC and President(during New Member Orientation)
- Sending of MC Control Letters by MC Attendance Champion
- Acknowledge people for perfect attendance monthly
- Play the BNI Game
- Follow-Up Phone calls by MC weekly - Is everything OK?
- Educate members on how/where to find a sub
- Implement the Mentoring Program
- Accurate tracking of lates and absents by VP (Strict Adherence)
- Email or Handout VP Reports to Members Monthly
- Bring Your Sub Day

1 to 1's

- Education on Importance of - Why & How (GAINS) from EC and MC (Relationship between referrals & 1:1's)
- Presidents a Stress value of 1:1's in NEW MEMBER ORIENTATION
- Use of Dance Card Thank You Slips to track results weekly
- Acknowledge people for MOST 1:1's monthly
- Promote Advanced Training Module regarding 1:1's
- Have a 1:1 Contest
- Play the BNI Game
- Implement the Mentoring Program
- Business Card Swap - Execute 1:1, then deliver each other's intracommercials the following week

CEU's

- Promote availability of training (When and Where) via email, flyers, announcements & testimonials
- Attend MSP within 30 days of Membership
- Encourage existing members to attend MSP, especially HOSTING a member they sponsored
- Education around the value or training by EC's and MC's
- Use of the CEU Tracking Slip
- Create a chapter library with educational Books and CD's & encourage members to use it
- Play the BNI Game
- Acknowledge members attending trainings through monthly recognition
- Acknowledge monthly leaders (Guests, Referrals, 1:1's etc.) with Scholarships to trainings (Paid by chapter kitty)
- Implement the Mentoring Program
- Encourage ALL members to attend Leadership Team Training

Visitors per Month

- Treating every week as visitor's day with members bringing guests weekly
- Encourage members to attend non BNI networking events to expand their networks
- Education around the importance of visitors and 100% participation from members in inviting visitors
- Education around Identifying and Inviting Visitors by EC and MC
- Education around Power Teams and Power Team Program Implementation
- Visitors Days (Interface with Director)
- Stack Days
- Post Card Program (Interface with Director)
- Bring your _____ Day (Sub, Best Vendor, Best Client)
- Double your chapter day
- Create and Promote a chapter Most Wanted List
- Create Industry tent cards for Chapter Meeting and leave empty seats
- Acknowledge members that bring the most guests monthly
- Play the BNI Game
- Implement the Mentoring Program
- Email or Handout VP Reports to Members Monthly
- Handout CD's regarding Inviting Guests to members
- Meeting announcement to local newspapers promoting chapter
- Chapter participate in local Trade Show to promote Chapter (Interface with Director)
- Purchase a Chapter Website via the www.BNIWCF.com site Chapter Toolbox Interface w/ Director

Memberships per Month

- Hit Visitors per Month Goal above
- Run an exceptional meeting each week with LT members executing their roles flawlessly
- Execute at least 2 Invitations during the meeting for guests to participate in a Visitor Orientation immediately following the meeting
- VH early to meeting to greet and welcome guests
- VH run a PROPER Visitor Orientation after meeting
- VH call guests after meeting(What did you like best? Any questions? Come on back next week for a 2nd visit)
- VH Fax Visitor sign in sheet weekly
- Chapter Mentoring Program (Supports member retention in terms of renewals)
- MC implement 3-9 Month Member Review Process Performance Reviews (regarding renewals)
- Implement the Referral Thank You Program
- Assure MC is interviewing (using the MC Interview Guide) and attracting HIGH LEVEL PLAYERS

of Members in Chapter

- Execute effectively on Visitors per month and Memberships per Month above and it will all take care of itself.

of Referrals Per Month

- Driven by number of members in chapter (Double Chapter Size - Triple Referrals) - 30-40 Member chapters should pass 1.5 referrals/member/week while 40-50 member chapters should pass 2 referrals/member/week on average
- Education by EC, MC on Relationship Building Skills and PROACTIVE Referral Generation
- Promote regional and run after chapter Advanced Training Workshops/Classes (Referrals, Dance Cards, Intromercials, 10 Minute Presentations) as ALL topics positively impact referral generation
- Acknowledge members that bring the most referrals monthly
- Have the members that pass the most referrals do an educational moment on How they do it.
- Play the BNI Game
- Schedule a chapter social to promote and foster relationships
- Create a Preferred Provider List
- Implement the Mentoring Program
- Email or Handout VP Reports to Members Monthly
- Handout educational CD's regarding Referral Generation to members from the chapter library
- Promote/Educate on the value of 100% Attendance, Good Intromercials, 10 Minute Presentations, 1:1's etc.

Revenues Generated

- Implement the Referral Thank You Program
- Educate and Inspire members to participate in the tracking of Revenues Generated
- Post your Revenues Generated weekly/monthly for all members & guests to see
- VP comment on Revenues Generated in weekly VP Report including \$ Revenues per Seat and figures
- Play the BNI Game
- Acknowledge members passing most \$'s and Units monthly

Tips

- Communicate Goals/Vision to Chapter Members Frequently!!!
- Provide Chapters GOALS to New Members at NEW MEMBER ORIENTATION
- Your LT should Lead by Example on all Metrics
- Remember TO HAVE LOT's OF FUN - MEETING STIMULANTS EVERY 6-8 WEEKS



Our BNI® members in **GREEN** generate on average eight (8) times more revenue in their BNI Chapter than a member that has a Power of One score in **RED**.

MONTHLY REGIONAL LEADERSHIP ROUNDTABLE

Each Chapter President has agreed to represent your chapter at one of the Regional Monthly Leadership Roundtables. This is where the Presidents bring a spotlighted support team leader. The collaboration between groups is only as strong as your participation. The format this year is drastically different so please go ahead and register for the roundtable. Since one of our Core Values is recognition, we will recognize the members each month who represent your chapter. Please register on the Calendar at www.bnialtl.com

October:	Mentor Coordinator & Mentors
November:	Vice President
December:	Membership Committee
January:	Secretary/Treasurer & Marketing
February:	Visitor Hosts
March:	Leadership Summit – Leadership Teams
April:	Education Coordinator
May:	Vice President & Membership Committee
June:	President
July:	Outgoing President/Incoming President
August:	Incoming President, Vice President, Secretary/Treasurer
September:	Leadership Team Summit (no roundtable)

CHAPTER SUCCESS MEETINGS

Every BNI Chapter is requested to conduct a Chapter Success Meeting and submit it using the following form link (found in a BNIatl.com > Resources > Leadership Team Resources > Chapter Success Meeting Online Form - Fillable Online Form): [Chapter Success Meeting Online Form](#)

The Monthly Chapter Success Meeting is the former Leadership Team Meeting, Membership Committee Meeting and Director Consultant Meeting wrapped into one. It should happen the second or third week of the month when the newest **Power of One Report** is available, and the Director Consultant visits the Chapter.

Attendees & Agenda

- The **Vice President** and **Membership Committee** are present for the entire meeting.
 - The **President, Secretary/Treasurer** and **Visitor Host Coordinator** will attend through the Passport to Success Progress agenda item.
 - The **Mentor Coordinator** will attend through the Power of One Report review.
- Preparation for the Meeting

In preparation for the meeting, copies of the following reports should be available during the meeting:

- **Chapter Success Meeting Form** – This Form
- **Chapter Success Meeting Report** – previous month
- **Chapter Visitor Report** – BNI Connect®
- **Chapter Roster Report** – BNI Connect®
- **Chapter Traffic Lights** – BNI Connect®
- **Members Power of One Report** - BNI Business Builders
- **Membership Dues Report** – BNI Connect®
- **Seven-Month Review** (as many as needed)

When submitted, the email that was provided will be emailed back a formatted PDF document of the form that you may use and bring to next month's meeting. The form is also submitted to the Regional Office so that the BNI Director Team can review and support your Chapter.

Those BNI Chapters that are conducting these monthly Chapter Success Meetings do the following:

- Successfully communicate the needs of the Members, Chapter and Visitors
- Each role discusses what is going great and what may need some attention.
- A meeting to Review and Discuss Actions & Results
- Become a much more functional chapter that thrives!