CHAPTER SUCCESS MEETING FORM

Chapter: _____ Scribe: _____ Date: _____

Pres:	Vice Pres:	Sec-Treas:
MC Engagement:	MC QA:	MC Relationships:
MC Community Builder:	Growth Coord:	VH Coord:
Educ Coord:	Mentor Coord:	DC

Review action items from last meeting: _____

_____

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VISITOR HOST COORD. REPORTS: Visitor Registration Report; & Visitor Not Attended Report

Report is given by Visitor Host Coord & Secretary-Treasurer.

Review Visitor Attendance: No. of Visitors in the last month: _____

Add Names Here	Result & Reason – applied / not applied / revisit / guest	Member to follow up

VICE PRESIDENT REPORT: Membership Dues Report
MC COMMUNITY BUILDER REPORT: Annual Growth Calendar
GROWTH COORDINATOR REPORT: Regional & Chapter Events

Membership Review	No.	Name	Growth & Action Items
# New members last month			
# Dropped members last month			
# *Pending members last month			
# **Late members last month			
Net Growth last month (goal 1 per month)			
Growth Calendar completed? (ie visitor days and other events)	Yes / No		

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VICE PRESIDENT REPORTS: Chapter Roster Report & Chapter Traffic Lights
EDUCATION COORD. REPORT: Prepare next 4 weeks education from Action items
MC COMMUNITY BUILDER REPORT: Annual Growth Calendar
GROWTH COORD. REPORT: Regional & Chapter Events

Reports Review: Chapter Roster Report:
Full leadership team? Yes / No
Are there any gaps to fill? Yes / No

Roles need to be filled	Member to follow up

Chapter Traffic Lights (TL): Add in all values and highlight minimum 2 areas to improve on

Size & TL Colour	Growth & TL Colour	Retention & TL Colour	Referrals & TL Colour	Visitors & TL Colour	Conversion & TL Colour	Absenteeism & TL Colour

What mechanisms will you be using to achieve this?***
Education needed for 4 weeks.

Education Coordinator 4 Week Presentations to coincide with mechanisms?

MC Community Builder / Growth Coordinator to discuss events and calendar to achieve results.

2 Leaders should attend Leadership Team roundtable every month (Pres, VP, ST or MC):

Month:		Month:		Month:	
Name	Role	Name	Role	Name	Role
Name	Role	Name	Role	Name	Role

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MENTOR COORDINATOR REPORTS: New Member Mentor Schedule
VICE PRESIDENT REPORTS: Membership Dues Report (to highlight new members joined <12 months)

Passport to Success Progress:

Member Name	Details of Member Success	Mentor Allocated & comments

VISITOR HOST COORD, EDUCATION COORD, MENTOR COORD TO LEAVE THE MEETING AT THIS POINT.

SECRETARY TREASURER REPORTS: Budget & Finance Report, & Speakers Report

Item	Details	Actions & Member accountable
Chapter Bank Account current balance	$	
Members in Arrears:	1.	
	2.	
	3.	
	4.	
Do speakers coincide with relevant stack days (as per growth calendar)?		

PRESIDENT & SECRETARY-TREASURER TO LEAVE THE MEETING AT THIS POINT.

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VICE PRESIDENT & MEMBERSHIP COMMITTEE ONLY

This point onwards remains confidential to Director Consultant, Vice President & Membership Committee only

Go for Green (Membership Committee Report)

*Just put the members in **RED** and **GREY** from the Members Traffic Light report.*

Members Name	Visitors Last 6 mos	TYFCB	One-to-Ones Per Week	Referrals Per Week	Sponsors Last 6 mos	CEU Per Week	Absences

Members with more than 3 Absences and 3 Substitute

Members Name	Absences	Substitute

Seven Month Reviews	Traffic Lights Score	Discussions in Review	Member Accountable to action

Approving Renewals	Traffic Light Score	Discussed procedural process and probation where necessary	MC decision on renewal: Yes / No

Progress of Written Complaints:

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Name	Brief Synopsis	Action Items & MC Responsible

Recommendations for the Chapter President:

Recommendations for the Director Consultant:

Additional writing space for notes, visitors, etc.

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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 going OK? Is there anything we can help you with?
- Educate members on how/where to find a sub
- Implement the Passports Program
- Accurate tracking of lates and absences by VP/Membership Committee (CRITICAL to Chapter Success)
- Email or Handout MC Reports to Members Monthly
- Bring Your Sub Day

One-to-One's

- Education on the importance of the GAINS Exchange: the most powerful and yet most under utilised tool in BNI today.
- Presidents to emphasize the value of One-to-Ones in NEW MEMBER ORIENTATION
- Use of TYFCB slips to track results weekly
- Acknowledge people for most One-to-One's monthly
- Promote advanced training on powerful One-to-Ones available from your BNI Director
- Have a One-to-One Contest
- Play the BNI Game
- Implement the Passports Program
- Business Card Swap - Do a One-to-One, then deliver each other's Referral Request the following week

CEUs

- Promote availability of training (When and Where) via email, flyers, announcements & testimonials
- Attend MSP within 60 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
- N/A
- Create a chapter library with educational resources & encourage members to use it. Encourage members to logon and review what's available at BNI Business Builder
- Play the BNI Game
- Acknowledge members attending trainings through monthly recognition
- Acknowledge monthly leaders (Visitors, Referrals, One-to-One's etc) with access to trainings paid by Chapter.
- Implement the Passports Program
- Encourage ALL members to attend Leadership Team Training

Visitors per Month

- Treating every week as visitors' 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 the benefits of creating strong collaborative relationships with members that provide non-competing services to the same clients
- Visitors Days (liaise with your BNI Director)
- Stack Days
- Post Card Program (liaise with your BNI Director)
- Bring your Sub, Best Supplier, Best Client
- Double your chapter day

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- Create and promote a chapter Most Wanted List
- Create Business Specialty tent cards for Chapter Meeting and leave empty seats
- Acknowledge members that bring the most Visitors monthly
- Play the BNI Game
- Implement the Passports Program
- Email or Handout MC Reports to Members Monthly
- Providing members resources on how to invite visitors
- Meeting announcement to local newspapers promoting chapter
- Chapter participate in local Trade Show to promote Chapter (liaise with local BNI Director)

Memberships per Month

- Hit Visitors per Month Goal above
- Run an exceptional meeting each week with LT members executing their roles flawlessly.
- Make sure the Chapter always remains focused on its Mission
- 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? Inviting again, stating Visitors are allowed 2 visits)
- VH scans and emails visitor sign in sheet weekly
- Chapter Passport Program (Supports member retention through a more rapid engagement in the Chapter)
- MC implement 3-6-9 Month Member Review Process, to ensure appropriate participation levels and renewal.
- Implement the Referral Thank You Program
- Assure MC is interviewing (using the MC Interview Guide) and attracting HIGH PERFORMING MEMBERS

of Members in Chapter

- A Professional meeting experience with regular visitors is what's required for the Chapter to thrive and grow.

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 Director Led Training Workshops (Referrals, One-to-Ones, Weekly Presentations, 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 event to promote and foster relationships
- Create a Preferred Provider List
- Implement the Passports Program
- Email or Handout MC Reports to Members Monthly
- Providing educational videos on Referral Generation to members from bnibusinessbuilder.com
- Promote/Educate on the value of 100% Attendance, specific weekly presentations,10 Minute Presentations that ask for referrals, Gains Exchange, One-to-Ones, etc...

Revenues Generated

- Send a reminder to all members to add their Referral Thank You's into BNI Connect
- Educate and Inspire members to participate in the tracking of Revenues Generated
- Post your Revenues Generated weekly/monthly for all members & guests to see
- MC comment on Revenues Generated in weekly MC Report including a Revenue per Seat figure (say over past 12 months)
- Play the BNI Game
- Acknowledge members passing most $TYFCB monthly
- 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
- Are the Presentation slides in the correct order according to BNI Agenda
- REMEMBER TO HAVE LOTS OF FUN - MEETING STIMULANTS EVERY 6-8 WEEKS