BNI MN Mentor Program: 12 Months to Success

Many chapters are starting a Mentor Program to help members experience more success and feel a part of the group sooner, especially as new members. Some prefer a less formal feel, and refer to their mentor as their BNI buddy.

Summary of Key Roles
Mentor Coordinator: Assigns a mentor to all incoming members and to existing members who want/need extra coaching.
Mentor: A productive, positive member who sets a good example and has been a member for at least 6 months. (In newly formed chapters, Core group members Mentor new members.) Coaches Mentee, helping them become a productive and valued member faster.
Mentee: New members or existing members who want or need additional coaching. The Mentee drives the relationship, taking the initiative to follow the program and schedule conversations and reviews with their Mentor.

The relationship between the Mentor and Mentee should be beneficial for both members. Ask permission from the perspective Mentor before making the assignment.

When matching members together, consider the following:
  A. Contact Sphere/ Power team--Establishes a foundation to build on each others business, therefore building the team and helping the new member feel productive right away.
  B. Personality
  C. Comfort level between the two members

After making the assignment. Give each of the participating members the Mentor Packet, which includes:

1. BNI Mentoring Process; 12 Months to Success—Step by step guideline for mentees and mentors.
2. 90-Day Review—Mentee fill out and review with Mentor.
3. Five Month Questionnaire for Mentee
4. Mentoring Program 7 Month Follow-up
5. Mentoring Program 9 Month Review
6. Membership Committee Review Form

Other helpful documents are One to One forms and Referral tracking sheets. The Mentor Packet and other forms are available at www.bni-mn.com, Members Only, View Forms to Download.

Meet with the Mentor and Mentee before or after a meeting and give them the packet. Tell them to hold on to these forms and refer to them regularly. Explain each of their roles and let them know that you are available for assistance via phone, email, and in person.

Check in with both members regularly on their progress and ask for questions or suggestions for future Mentor/Mentee relationships.
Suggested Tips for Mentors
(May vary based on the tools provided at your chapter meeting. Adapt for your circumstances.)

1. Do first dance card. Use the One-to-One Dance Card Planner (download it from www.bni-mn.com; Members Only; View Forms to Download).

2. Make sure your mentee is scheduled for the Member Success Program

3. Sit next to them the first 4 weeks
   a. Introduce them to members that belong in their sphere
   b. Pull a list of chapter members from website and give it to them
   c. Explain the importance of the Name badge, and working the room during open networking
   d. Sit some place different in the room every week

4. Help them identify who they know to invite each week! Show them how to invite.
   a. Give: postcard one week
   b. Give: fold over card one week
   c. Give: fax information sheet one week
   d. Show them how to do an e-Invite if your chapter has Chapter Tool Box

5. Help them set-up cardholder.
   a. 3 cards of each member
   b. Put into sphere’s
   c. Mark “out” on last card of every member. (This way they will know with to restock and which cards.)

6. Help with 60 sec.

7. Referral Slips
   a. How to fill in and tear apart-who to give what to
   b. “I have” part/only ONE testimonial. They need to fill out a referral slip for referrals and visitors.

8. Use Agenda (fold-over form from website OR in Member Policies Brochure)
   a. BNI philosophy
   b. BNI agenda
   c. Notes: talk about listening to members 60 sec. and taking notes of what to be looking for this week.

   a. How to use
   b. Password: Will receive their own in separate email

10. Spend 5 min after meeting talking about whom they should focus on this week to bring a referral to next week. (Use the folder with the notes from the 60 sec.)
### BNI MN Mentor Program: Month-by-Month Outline for New Members (Mentees)

<table>
<thead>
<tr>
<th>Week 1</th>
<th>After Meeting, introduce yourself to your mentor, set up a One to One (at the convenience of your mentor). Mentor: explain the importance of the Open Networking time and what a one-to-one/dance card is.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1.5</td>
<td>Call your mentor and ask them to explain the Givers Gain philosophy.</td>
</tr>
<tr>
<td>Week 2</td>
<td>Sit next to your mentor at the BNI meeting. Have them explain how to use the card holder, critique your commercial (remember to thank them for their comments), and show you how to use the Referral Slip to pass a great referral.</td>
</tr>
<tr>
<td>Week 2.5</td>
<td>Call a member of your chapter and schedule a one-to-one (dance card) with them.</td>
</tr>
<tr>
<td>Week 3</td>
<td>Sit next to your mentor at the meeting. Have them explain the importance of inviting visitors to the meeting. Ask them to critique your commercial and to explain Power Teams (contact spheres), including the importance of building a strong one. Have them introduce you to the people who are in your Power Team.</td>
</tr>
</tbody>
</table>
| Week 3.5 | 1. Visit the international website ([www.bni.com](http://www.bni.com)) and BNI Minnesota’s regional website at [www.bni-mn.com](http://www.bni-mn.com). Use the password that has been emailed to you from bni-mn.com to review your own listing. There is a lot of valuable educational information on these two websites. PLEASE EXPLORE!  
2. Register for a Member Success Program through the Event Calendar on www.bni-mn.com. (If you are unable to, contact your chapter’s Secretary/Treasurer so they enter you and you receive your BNI User Name and Password.)  
3. Send 20 invitations to your business colleagues inviting them to your BNI meeting. Use pre-printed postcards (available from your chapter president), e-Invites (if your chapter has a Chapter Toolbox), or adapt a Visitor Day letter. |

**How to Review, Change, or Add to your personal BNI Listing**

Go to [www.bni-mn.com](http://www.bni-mn.com).

Click on Members Only.

Sign in using your User Name and Password.

(If you do not have this, follow the Lost Your Password? section on the screen and your sign on info will immediately be sent to your email address on file.)

Click on Members, Edit/Add.

Review your listing and change your BNI user name and password, your email address, add key words for searches.

Click Save Changes to save the data.

Only Secretary/Treasurers can change Category. For name, address, or
<table>
<thead>
<tr>
<th>Week 4</th>
<th>Sit next to your mentor at the meeting. Have them explain the substitute program, the importance of having a sub, BNI Bucks and how to track your BNI business. Meet someone new after the meeting.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 4.5</td>
<td>Call someone from your power team/contact sphere, ask them to explain what a good referral would be for them. Try to bring them this referral. REMEMBER: The more you give, the more you get.</td>
</tr>
<tr>
<td>Week 5</td>
<td>Sit next to someone on your Power Team. Set up a one-to-one (dance card) with them. Ask them to critique your commercial and thank them for their comments.</td>
</tr>
<tr>
<td>Week 5.5</td>
<td>Review the past five weeks—what have you learned? How do you feel about your progress? Ask your mentor for guidance and/or call your assistant director if you have questions.</td>
</tr>
<tr>
<td>Week 6</td>
<td>Sit next to somebody “new”. Ask them if they know anybody whose profession is part of your Power Team. Ask if they would help you to invite them to the next chapter meeting.</td>
</tr>
<tr>
<td>Week 6.5</td>
<td>Check in with your mentor. Ask them to evaluate your progress over the past 6 weeks.</td>
</tr>
<tr>
<td>Week 7</td>
<td>Arrive extra early to the meeting to take advantage of the Open Networking. Stay after the meeting to generate and schedule one-to-ones.</td>
</tr>
<tr>
<td>Week 7.5</td>
<td>Invite people to help fill other Power Teams. This will help your BNI chapter (sales force) be successful!</td>
</tr>
<tr>
<td>Week 8</td>
<td>Sit next to your mentor. Thank them for their help. Ask them to critique this week’s commercial and thank them for their comments.</td>
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**During Month 3**
1. Spend time thinking about your Power Team and invite professions that would help grow it.
2. Prepare for your 10-minute presentation.
3. Visit another chapter.
4. Identify several substitutes.

**During Month 4**
1. Check in with your mentor.
2. Set up one-to-ones with members you haven’t yet met with.
3. Continue to invite potential members. Invite ones you’ve invited before—it often takes people 3-5 invites before they say yes.

**During Month 5**
1. Review the BNI websites for new materials.
2. Review past referrals given/received. Track your success and share it with your chapter.
3. Focus on building strong relationships with your power team. BNI and word-of-mouth marketing is a process of farming relationships. (If you don’t know what this means, ask your mentor or assistant director.)

**During Month 6**
Meet with your mentor. Explain your successes. Ask for guidance on any rough spots or challenges.

**During Month 7**
Set a goal to be the referral leader for that month. Focus on giving, giving, giving.
| During Month 8 | 1. Get your PowerTeam together for a group one-to-one.  
2. Identify (as a group) your target accounts/referrals and implement a plan of “attack.”  
3. Build your Power Team; the more the merrier. |
| During Month 9 | Consider taking on a leadership role in the next year. Check with your mentor to see what role might be a fit for you. |
| During Month 10 | Continue to schedule one-to-ones. Meet with chapter members a second time, if you’ve already met with everyone once. Visit [www.bni-mn.com](http://www.bni-mn.com); Members Only, View Files to Download—it has several One-to-One (dance card) formats to use. Remember that your industry changes all the time. Explain these changes. |
| During Month 11 | 1. Take time to reflect on the past year and review your accomplishments.  
2. Identify your strengths and weaknesses in BNI over the past year.  
3. Did you take advantage of every opportunity possible?  
4. Check in with your mentor.  
5. You’re up for renewal! Ask your Secretary/Treasurer for a Renewal Application. |
| During Month 12 | CONGRATULATIONS!! You made it One year. Ask your chapter president for a One Year Member ribbon. |
**BNI Minnesota Mentor Program 90-Day Review Form**

<table>
<thead>
<tr>
<th>Chapter Name:__________________</th>
<th>Date Inducted or Renewal Date:__________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mentee:________________________</td>
<td>Mentor:______________________________</td>
</tr>
<tr>
<td>Occupation:_____________________</td>
<td>Mentee’s Phone________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Referrals given to date:_________</th>
<th>Referral’s received to date:_______________</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Percentages of referrals that have become sales:______________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of members who have referred to me:______________________________</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td>Number of members with whom I have scheduled at least one “dance card”:________</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
</tr>
<tr>
<td>Number of guests that have become members:______________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My presentation skills have improved:</th>
<th>YES</th>
<th>SOMEWHAT</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am more comfortable speaking in front of groups:</td>
<td>YES</td>
<td>SOMEWHAT</td>
<td>NO</td>
</tr>
<tr>
<td>I am beginning to establish strong relationships:</td>
<td>YES</td>
<td>SOMEWHAT</td>
<td>NO</td>
</tr>
<tr>
<td>I am satisfied with my BNI membership:</td>
<td>YES</td>
<td>SOMEWHAT</td>
<td>NO</td>
</tr>
<tr>
<td>I would like to consider a role on the Leadership Team:</td>
<td>YES</td>
<td>SOMEWHAT</td>
<td>NO</td>
</tr>
</tbody>
</table>

By month four and five of my membership, I want to improve on: (2 or 3 things)

1.____________________________________________________________________________
   ____________________________________________________________________________
2.____________________________________________________________________________
   ____________________________________________________________________________
3.____________________________________________________________________________
   ____________________________________________________________________________
BNI Minnesota Mentor Program: Five-Month Questionnaire for Mentee

Chapter Name_________________________ Date Inducted/ Renewal Date________________

Please rank on a scale of 1 to 6 (One being “Needs Improvement” and Six being “Excellent”) the following:

1. Explanation by mentor of leadership team role. Usage of new member packet, BNI substitute and attendance policies and importance of referrals.

<table>
<thead>
<tr>
<th>Needs Improvement</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

Comments: ________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________

2. MSP presentation by Assistant Director. Review and explanation of key concepts and how they helped you gain trust and credibility in your chapter.

<table>
<thead>
<tr>
<th>Needs Improvement</th>
<th>Excellent</th>
</tr>
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<tr>
<td>1 2 3 4 5 6</td>
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</tr>
</tbody>
</table>

Comments: ________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
__________________________________________________________________
3. Completed Session 3 concerning review and fine tuning. The areas I focused on during the last 60 days were: (Place an “X” by the top 5 areas that you focused on.)

___ Questions from Session 1 topics
___ Questions from Member Success Program
___ 60-Second presentation
___ 10-Minute presentation
___ Member Bio Sheet
___ Importance of Dance Card- GAINS Profile, 10 Questions and Business Building Interview
___ How to generate a referral
___ Inside and outside referrals
___ Power teams (contact spheres)
___ How to find information on websites
___ Library material (if chapter has reference/library table)
___ Visitor letters (to build contact sphere)
___ Importance of attending outside of chapter activities
___ Chapter policies (ice days, chapter dues, etc.)

Your overall ranking of the Mentoring Program for members:

<table>
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<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>

Comments: _________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

___________________________________________________________________________
BNI Minnesota Mentor Program 7-Month Follow-Up

Date: _______________________  Time of Meeting: ____________________

Form of Meeting (circle one):  Phone  One-on-One

Identify three topics you wish to discuss:

1. ________________________________________________________________________
   ________________________________________________________________________

2. ________________________________________________________________________
   ________________________________________________________________________

3. ________________________________________________________________________
   ________________________________________________________________________

4. ________________________________________________________________________
   ________________________________________________________________________

Identify goals reached since last meeting:

1. ________________________________________________________________________
   ________________________________________________________________________

2. ________________________________________________________________________
   ________________________________________________________________________

3. ________________________________________________________________________
   ________________________________________________________________________

4. ________________________________________________________________________
   ________________________________________________________________________
BNI Minnesota Mentor Program 9-Month Review

Date: _____________________________  Time of Meeting: _____________________

Form of Meeting (circle one)  Phone  One-on-One

Identify three topics you wish to discuss:

1. Are there any current challenges that are getting in the way of your success at your BNI Chapter?
   __________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________

2. How can we help you?
   __________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________

3. Are you planning to renew your annual BNI Membership?
   ________Yes  ________No  _______Not sure
   If “No” or “Not Sure” please explain__________________________________________
   __________________________________________________________________________

4. Renewal Process: Renewal Application is filled out and given to Membership Committee for approval. Upon arrival, it is sent to the Secretary/Treasurer for processing at the Regional BNI Office.
BNI Membership Committee  
BNI Member Review Form  
To be done 90 days prior to renewal

MEMBER_____________________________DATE OF REVIEW_________________

1. Referrals given since last renewal date_______________________________________
2. Referrals received since last renewal date_____________________________________
3. Number of visitors brought since last renewal date_____________________________
4. Does member give a different and informative 60 second presentation each week?  
   YES   NO
5. Does member bring door prize when giving their spotlight presentation?  
   YES   NO
6. How many absences has member had since the beginning of the current leadership  
   team term? ____________________________________________________________________
7. How many times has the member arrived late or left early? __________________________
8. Does member actively participate in the chapter?  
   YES   NO
9. Does the member display a positive attitude?  
   YES   NO
10. Have there been any concerns expressed by other members regarding the quality  
    of referrals given by this member, unacceptable overlap in category or other issues?  
    YES   NO

   Explain, if yes:  
   _____________________________________________________________________________
   _____________________________________________________________________________
   _____________________________________________________________________________

Membership Committee Recommendation:  

_______Renewal  

_______Renewal, with the following conditions:  

_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________

_______Do not renew this member