How Best to Use the BNI Forms

Referral Form – Carbonless (Three-part)

First, don't wait to use the form. Make a phone call or send an email to make the introductions and/or referrals to the member. Then, at the next meeting provide the written referral to document the referral to Leadership. Certainly, use it during the meeting to respond to an Ask made by a member when you can immediately make a referral (you can follow-up with an email, phone call or introduction later).

Complete the form, as full as possible (if emailed or called already can be more brief), however, for documentation purposes, always remember to use full names (From, To, Referral) and the Date of the referral. Note the temperature of the referral by marking the thermometer. There are distribution directions listed on bottom right for each of the copies:

- **White** – To (to whom the referral is for)
- **Pink** – Chapter (into the lid or box circulated during the meeting to allow the leadership to document the referral)
- **Yellow** – From (your copy)

There is a Referral Log (Excel spreadsheet) that can be used if you want to track your referrals. I will send it out with the Ed Piece to the members. If you have questions about the Log, send an email to the Ed Coordinator and they (I) will get an answer and respond to you.

One to One Form - Blue

Most important to know is that both people complete and turn in the form to the
Chapter during the meeting (into lid or box passed) since both people participated (sometimes more than two are present, all complete the form).

Complete the form in full for documentation purposes. "Initiated by" is whoever first requested the meeting; "Met with" is whoever else is present in the meeting. Note location, list "topics" of conversation (the purpose is accountability), Chapter name and date of the meeting.

Closed Business Form - Green

The form is completed by the person who closes the business (i.e., you received the referral, followed-up, provided the service or product and closed the business). This is the only tracking of closed business that BNI tracks.

Most important to remember to write who the "Closed Business Form" is from, since it isn't asked for on the form. My recommendation is to put it right under "Thank You to…", think after "to" to write "from." Use the Comments section to note the particulars of the project, service or product (helps with tracking to a unique transaction, should you need it in the future). The date is the date you are reporting the business as closed.

If you receive payment in installments, you may wish to report closed business as you are paid. You may also wish to wait to report the closed business all at one time. It has even been suggested to report the closed business once the service is complete (regardless of when you actually receive payment). Remember: there are Tier 1 (Network Partner member), Tier 2 (referral by Network Partner), and Tier 3 (referral of a referral from Network Partners) referrals to report on. The choice is yours; just please do report the closed business. These totals are used to determine the value of being a member.

Weekly "Ask" Spreadsheet

Every week you will find a blank "Ask" spreadsheet at your seat. It lists the names, professions and contact information for each of the members of the group. The purpose is for you to fill it in based on the Ask provided by your fellow members so that you can refer back to it during the week, and following weeks as time goes by, to understand more about the referrals that you can make to your Network Partners.

If there are questions about any of the forms, submit them to your group's Education Coordinator and they will pursue it and respond with an answer.