



# Tracking BNI Activity

## Entering Slips

Entering “slips” into BNI Connect is how BNI tracks the activity and successes of its Members. Like a business will set and track goals, so does every BNI Chapter. We are working towards standardized global reporting and the first step is to have all Chapter Members use either the BNI Mobile App or the BNI Connect Web version. The following explanations highlight these four activities:

- One-to-One Slips
- Chapter Education Unit Slips
- Referral Slips
- Thank You for Closed Business Slips

All slips can be entered online at [www.bniconnect.com](http://www.bniconnect.com). Using your username and password, go to My BNI Business and Submit your respective slips on the lower half of the page. Or you can use the BNI Mobile App, screen shots to follow. By entering your slips electronically, you are now able to track your activity electronically, reduce the paperwork within your Chapter, as well as automatically enter your personal activity on the Chapter PALMS Report, thereby saving your Vice President time!

If you submit paper slips, please complete your slips in advance of your weekly BNI Chapter Meeting. When you enter your slips electronically or bring your completed slips to the meeting, you demonstrate that you are prepared to spend valuable, face-to-face meeting time building relationships with your referral partners. The goal is to avoid the distraction of filling out slips after you arrive. During Open Networking, you should discuss referrals, arrange One-to-Ones, greet visitors and talk about Chapter business. When we follow proper slips protocol, we position ourselves and others to receive the greatest benefit from our structured BNI Chapter Meeting.

## One-to-Ones

### Purpose

One-to-Ones are key to relationship building and learning how to pass higher quality referrals to your BNI Chapter Members. In essence, it is a referral strategy session.

### Completion

The Member who initiated the One-to-One:

- Enters the One-to-One electronically

### Reporting

- **Electronically:** When a Member enters a One-to-One electronically, both parties receive credit for completing the One-to-One. With electronic reporting, a Member can enter One-to-Ones with Ambassadors, Directors and Members of other BNI Chapters throughout the world! as well as Members within their own Chapter. For detailed instructions, visit [BNI Connect Help](#).
- **Vice Presidents:** When checking and submitting your weekly PALMS report in BNI Connect, the electronically entered slips will automatically appear in your report.

The image displays two screenshots of the BNI Connect interface. The left screenshot shows the 'Submit One-to-One Slips' web form, which includes fields for 'Chapter', 'Met With' (with a 'Search Cross Chapter' button), 'Invited By' (with a 'Select Invited By' dropdown), 'Location', 'Topics of Conversation', and 'Date'. It also features a 'BNI® One-to-One follow up' section and a 'Confirm' button. The right screenshot shows the 'ONE-TO-ONE SLIP' mobile app interface, which includes a 'Cross Chapter Search' bar, a 'Where did you meet?' field, a date field set to 'Monday, December, 07, 2020', and a 'Topics of Conversation' field. A 'Confirm' button is at the bottom of the form. The mobile app has a red navigation bar at the bottom with icons for Home, Slips, Search, Visitors, and More.

# Chapter Education Units (CEUs)

## Purpose

Have you ever heard the phrase: “Learn More to Earn More”? There is a direct correlation between the networking education you complete and the revenue you generate from referrals. Submit your Chapter Education Units to report training and education you achieve through BNI sources.

Submit CEU Slips

**BNI® Chapter Education Units (CEU)**

Member: Jennifer Tolley | Date: 12/07/2020

Course Title	Credits/Course	Qty Earned	Total
1 Hour of BNI Podcasts, Webinars, BNI SuccessNet, etc.	1	0	
1 Hour BNI University or In Person Learning	1	0	
2 Hours BNI University or In Person Learning	2	0	
3 Hours BNI University or In Person Learning	3	0	
4 Hours BNI University or In Person Learning	4	0	
5 Hours BNI University or In Person Learning	5	0	
5 Hours Reading BNI Books, BNI Convention, etc.	5	0	
Total			

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Submit Close

CEU SLIP

1 Hour of BNI Podcasts, Webinars, BNI SuccessNet, etc. 0

Credits/Course: 1 Total: 0

1 Hour of BNI University or In Person Learning 0

Credits/Course: 1 Total: 0

2 Hours of BNI University or In Person Learning 0

Credits/Course: 2 Total: 0

3 Hours of BNI University or In Person Learning 0

Credits/Course: 3 Total: 0

Confirm

Total Credits Earned 0

Home Slips Search Visitors More

## Completion

The Member who completes any level of BNI education such as:

- BNI Business Builder Presentations, Training Programs, Podcasts, Webinar recordings
- Keys Skills Workshops
- BNI Books and Podcasts by Dr. Ivan Misner
- Mentor Program, Member Success Program
- Chapter Success Training (Leadership Team Training) and Area/Regional Leadership Roundtables

Each hour you spend on Chapter Education is equal to one credit. 1 hour = 1 credit

For detailed instructions, visit [BNI Connect Help](#).

## Reporting

- **Electronically:** When a Member enters Chapter Education Units electronically, the data is automatically entered into that week's PALMS Report. No paper CEU slip is necessary.
- **Vice Presidents:** When checking and submitting your weekly PALMS report in BNI Connect, the electronically entered slips will automatically appear in your report.

# Referrals

## Purpose

Referral Slips are not the actual referral, rather a mechanism to pass and record the information about the referral. When a potential referral is identified, contact the Member immediately to pass along the information so the referral can be acted upon in a timely manner. The BNI Connect Mobile app is the fastest way to pass a referral!

## Completion

The Member who is making the referral connection can:

- Pass a referral to any Member, Director, Ambassador or Global Support Member. For detailed instructions, visit [BNI Connect Help](#).

The screenshot shows the 'Submit Referral Slips' page in the BNI Connect web interface. At the top, it says 'BNI® Referral Slip (Be Sure To Announce This At The Meeting)'. Below this, there's a date and time stamp 'Date: 12/07/2020 | From: Jennifer Tolley'. A search bar is present with the text 'Please search cross chapter'. To the right of the search bar is a vertical thermometer graphic with numbers 1 through 5. Below the search bar, there are fields for 'Referral', 'Referral Type' (with radio buttons for 'Tier 1 (inside)' and 'Tier 2 (outside)' where 'Tier 2 (outside)' is selected), 'Referral Status' (with radio buttons for 'Given your card' and 'Told them you would call'), 'Address', 'Telephone', 'Email', and 'Comments'. At the bottom, there are buttons for 'Submit and New', 'Submit', and 'Close'. The BNI logo and tagline 'Changing the Way the World Does Business®' are also visible.

The screenshot shows the 'REFERRAL SLIP' screen in the BNI Connect mobile app. At the top, there's a 'Cross Chapter Search' bar. Below this, there's a 'Referral Type' section with two buttons: 'Inside' and 'Outside', where 'Outside' is selected. Underneath is a 'Referral Status' section with two checkboxes: 'Told Them You Would Call' and 'Given Your Card'. Below these are input fields for 'Referral', 'Telephone', 'Email', and 'Address'. At the bottom, there's a red navigation bar with icons for 'Home', 'Slips', 'Search', 'Visitors', and 'More'.

Be sure to select respective boxes for tracking purposes:

- **Inside:** You are referring yourself (or an immediate family Member in the household) for the first time to use another Member's product or service. One referral slip is given for the first time you use their service.
- **Outside:** You are referring someone outside the Chapter (not an immediate family Member in the household) to use another Member's product or service. One referral slip is given per new client referred.
- **Given Your Card:** Optional.
- **Told Them You Would Call:** Not optional. This is what makes this referral a true referral. When the person you are referring is expecting a call from the Member with anticipation. (To follow generally accepted privacy practices, some professions are prohibited from calling on potential clients; therefore, the person being referred must initiate contact.)

## Reporting

- **Electronic:** When a Member enters a Referral electronically, the data is automatically entered into that week's PALMS Report. They will not show up on your activity until the Vice President submits the PALMS report. Additionally, the Member receiving the referral automatically receives an email or push notification indicating the referral information so contact can be made right away. You may choose to print and bring to the BNI Chapter Meeting your Personal Meeting Activity Sheet using the Print Your Weekly Slips link under My BNI Business. For detailed instructions, visit [BNI Connect Help](#).
- **Vice Presidents:** When checking and submitting your weekly PALMS report in BNI Connect, the electronically entered slips will automatically appear in your report. In viewing summary reports, to calculate total number of referrals passed, the Referrals Given Inside and the Referrals Given Outside must be added together. In order to perform the Referral Reality Check, use the Slips Audit Report.

# Thank You for Closed Business

## Purpose

The Thank You for Closed Business (TYFCB) program is used as a note of appreciation and acknowledgement to the Member who GAVE you a business-generating referral. The program acknowledges Members passing qualified referrals, as well as measuring the value they are providing. It is important that the Member who receives the referral acknowledge the Member who passed them the referral. Report revenue you generate from referrals you receive. When you submit this data, you remain anonymous. Be consistent in your reporting.

The screenshot shows the 'Submit TYFCB Slips' web form. At the top, it says 'BNI® Thank you for closed business'. Below this, there's a date field set to '12/07/2020'. The 'Thank you to:' field has a dropdown menu with the instruction 'Please select from dropdown below or search cross chapter'. Below this is a search bar with 'Select a member from your chapter' and a 'Search Cross Chapter' button. The 'For a referral in the amount of:' field has a note 'Always use local currency'. The 'Business Type' section has radio buttons for 'New' (selected) and 'Repeat'. The 'Referral Type' section has radio buttons for 'Tier 1 (inside)', 'Tier 2 (outside)' (selected), and 'Tier 3+'. There is a 'Comments' field and a 'Changing the Way the World Does Business®' logo. At the bottom are 'Submit and New', 'Submit', and 'Close' buttons.

The screenshot shows the 'RECORD TYFCB' mobile app interface. It has a 'Thank you to:' search bar at the top. Below that is an 'Amount' field with a dollar sign icon. The 'Business Type' section has 'New' (selected) and 'Repeat' buttons. The 'Referral Type' section has 'Inside', 'Outside' (selected), and 'Tier3+' buttons. There is a 'Comments:' text area and a 'Confirm' button. At the bottom is a navigation bar with icons for 'Home', 'Slips', 'Search', 'Visitors', and 'More'.

Beyond benefiting the individual who brought you the referral, the Thank You for Closed Business Slips, at full value, demonstrate the value to Members and visitors of your Chapter's referral business. For this same reason, any business that originated with a BNI connection requires a TYFCB Slip forever ... even if the person who referred it is gone.

## Completion

The Member who received the referral that turned into closed business can:

- Enter the Thank You for Closed Business online, or using the BNI Mobile App.
- For detailed instructions, visit [BNI Connect Help](#).

**Thank You To:** The only name referenced in the Thank You for Closed Business Report is that of the person who passed the referral, not the person who received payment; **therefore, this is an anonymous program that credits the Members for the business that they GIVE to others.** When reporting electronically, the person you are acknowledging DOES NOT KNOW that you entered this data. This information is only stored on your BNI Business Page, so YOU know how much revenue was generated from your BNI connections; no one else has access to the revenue that you report.

**Thank You for Closed Business may also be submitted for business that comes from other Chapters, visitors or past Members; simply enter the Member who originally invited the past Member or visitor, enter the Visitor's name or enter BNI in the Thank You To line ... that way all business is recorded!**

*For a referral in the amount of \$:* This is not meant to be an exact science for reporting purposes. The goal is to have a consistent reporting system to recognize those Members who pass qualified referrals, while conservatively reporting the amount of business recognized by our Members. For consistency, please see the following pages for reporting guidelines.

## Reporting

- **Electronic:** When a Member enters their Thank You for Closed Business electronically, the data is automatically entered into that week's PALMS Report for the Member that is being recognized. The data will not show in your activity until the Vice President submits the PALMS Report that week. You may want to print and bring to the BNI Chapter Meeting your Personal Meeting Activity Sheet using the Print Your Weekly Slips link under My BNI Business; this creates a visual demonstration for the visitors how much completed business is being passed each week.
- **Vice Presidents:** When entering your weekly PALMS data in BNI Connect, the electronic entries will automatically appear in your report; simply add the paper slip value (if any) to the data already entered. In viewing summary reports, this will show each Member's value as a referral giver to the other Members of the Chapter.

**Note:** The TYFCB reporting is NOT to be used verbally as a replacement for the Referral and Testimonial time during the Chapter Meeting.

## What Value Do I Enter as Thank You for Closed Business?

Here is a general explanation of how to track closed business based on what type of business you are in. Not all professions are listed below. Use the suggestions below and common sense when it comes to measuring your profession's results with consistency. Consistency is the key!

Below are examples. Choose the category that best reflects you and your business structure.

### Commission-Based Industries

- Enter your gross commission figure.

Examples:

- ✓ Realtors
- ✓ Mortgage lenders

- ✓ Financial Planning
- ✓ Investments

- **Realtor:** A realtor sells a home for \$400,000. Most of that money goes to an owner or a bank. But the full amount that comes to the brokerage is credited to BNI even though the individual realtor may earn less than the full commission. The part that goes to the brokerage firm is one of your expenses of doing business. A realtor would write down the total fee to their *company* on the sale of the house, not just their personal commission. A \$400,000 house with a 7% realtor fee would be entered as \$28,000.

### Insurance Fields

- Enter the amount of the premium check. If the car insurance is \$600 per year, the amount entered is \$600. It is recommended that the annual value of the insurance plan is entered, even if they are paying month-to-month. This way a TYFCB slip is submitted only once per year for that client.

### Financial Advisors

- Enter amount of the commission fees, whether a fixed rate or percentage of portfolio amount. If the account is \$1,000,000 and the fee is \$1000, the amount entered is \$1000. If you work for an insurance company or an investment firm, the amount the customer is paying is what you credit to your BNI team Member, rather than the amount that actually ends up in your pocket. In other words, you report the amount that your *company* would report as gross income.

### Nonprofit Organizations

- Enter the estimated dollar value of donated goods, services, and volunteer time. Report the full amount of monetary donations. If the donations are a recurring amount, you can choose to report monthly or quarterly as long as you are consistent with the reporting.

## Service Providers

- Enter the gross amount you charged for your service. A \$1,500 website would be entered as \$1,500.

Fields that bill insurance would report the co-pay plus the insurance. Examples:

- |                              |                    |                     |
|------------------------------|--------------------|---------------------|
| ✓ Website designer           | ✓ Salon / Spa      | ✓ Attorney          |
| ✓ Business coaching          | ✓ Graphic designer | ✓ Medical doctors   |
| ✓ Pool repair/leak detection | ✓ CPA              | ✓ Dentists          |
| ✓ Title Service              | ✓ Entertainer      | ✓ Naturopaths       |
| ✓ Photographer               | ✓ Pest Control     | ✓ Chiropractors     |
|                              | ✓ IT support       | ✓ Massage Therapist |

## Product Providers

- The gross sale of the product plus service costs. A \$500 air filter plus \$100 installation would be reported as \$600. Include any insurance claims if applicable. Examples:

- |  |                                       |
|--|---------------------------------------|
| ✓ HVAC, Fencing, Shutters, Roofing, Plumbing, Flooring, Cabinets | ✓ Alarm systems and monitoring        |
| ✓ Landscape design and installation                              | ✓ Promotional products, printing      |
| ✓ Custom wood products   | ✓ Online sales (greeting cards, etc.) |
| ✓ General contractor   | ✓ Nutritional products                |
|  | ✓ Weight loss products, programs      |

## Banking

- One tricky category is banking. If a banker has a way of tracking how much revenue is coming into the bank, then this would be reported. Otherwise, please follow the definitions below to report closed business for non-commissioned referrals to banks:
  - ✓ Loans: Report the interest that would be generated if the loan would go full term
  - ✓ Deposits: Report 10% of the initial amount to open an account
  - ✓ Lines of Credits (i.e. credit cards, home equity loans, commercial lines of credit, etc.): Report 10% of the line amount

## Other

- Not all professions are listed above. Use common sense and the examples above when it comes to measuring a profession's results with consistency. *A short way to remember the complex description above is that with some exceptions, we generally track the total revenue to the individual Member and their respective company represented in BNI.*

## What about my privacy?

These numbers are tracked anonymously. You don't enter your name when tracking Thank You for Closed Business. The numbers are ultimately combined with everyone else's numbers.

## What if I have more questions?

Talk to your Director about how the Thank You for Closed Business Program can help your Chapter pass even more business.

