



Team Activity Worksheet – President

Every team deserves to take a moment and see how they are doing. Feedback from the entire team gives valuable information that can impact the future of the team. Below, simply evaluate the activities on a scale of 1-10, 10 being an excellent job. Turn these into the appropriate person on the team so they may see the individual responses (that are anonymous) to improve on their position.

1. _____ Run an enthusiastic and professional BNI Meeting utilizing the FOUR-page agenda
2. _____ Starts and end the meeting on time or 1-2 minutes early each week
3. _____ Allows LT Team to stand and give their name and business each week
4. _____ All online meetings are supported with the current slide deck and graphics
5. _____ Uses the phrase “for the benefit of our visitors” often during the meeting
6. _____ Brings up the sponsor and mentor while inducting new members into the chapter
7. _____ After the feature presentations, emphasizes finding business for those members
8. _____ Asks the visitors to complete their application and lock out their competition during the meeting
9. _____ Sets a specific time each week to send out weekly communications to the chapter
10. _____ Creates a 360-degree vision for the chapter and have a different member read it each week
11. _____ Uses meeting stimulants to keep the weekly presentations new and interesting
12. _____ Proactively participates in the Passport to Success Program
13. _____ Sets reasonable and stretch worthy goals with the Leadership Team and checks in on them at each monthly meeting
14. _____ Runs effective, fun, and productive LT meeting ONCE a month
15. _____ Is in contact with their Director Consultant on a regular basis for ideas or help
16. _____ Ensures all LT members are completing their duties at an elevated level
17. _____ Encourages recognition for the members, growth for the chapter, and deeper quality relationships for everyone
18. _____ Cooperates with neighboring chapters for events, or sending guests when they cannot apply at their own chapter
19. _____ Follows up with the visitors to the chapter to thank them for attending and answer any further questions for them

Please offer any additional comments that they could do in the future to better the entire chapter.

What is ONE item they could improve upon personally?

If you were in their position, what is ONE thing would you do differently?



Team Activity Worksheet – Vice President

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1. _____ Is willing, prepared, and enthusiastic about running the meeting when the President is absent
2. _____ Has a weekly time scheduled directly following the meeting to input the data into BNI Connect
3. _____ Trains members to enter their slips online
4. _____ Does a succinct, powerful, and exciting weekly report during the meeting
5. _____ Shares the PALMS Report monthly at the chapter in a printed format (in-person meeting)
6. _____ Shares the member traffic light report monthly via email or print
7. _____ Manages the new applications and renewals when they need approval in BNI Connect
8. _____ Proactively participates in the Passport to Success Program
9. _____ Oversees the monthly MC Meeting and Chairs the committee through empowerment of others
10. _____ Utilizes the "referral reality check" during the meeting on a regular basis (at least monthly)
11. _____ Sends the control letters to members consistently and with a "notice" it is coming
12. _____ Uses visuals – BNI Boards, Flip Chart, Poster, PowerPoint for weekly stats
13. _____ Give monthly notable networker certificates/awards to members with great statistics
14. _____ Brings the members to the FRONT of the room to receive the above recognition
15. _____ Finds a credible, proficient substitute for their position when an absence is necessary
16. _____ Is willing and easily upholds the policies of BNI with all members – no favoritism

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Team Activity Worksheet – Secretary/Treasurer

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1. _____ Handles chapter bank account professionally and shares the balance often with the team
2. _____ Reports large expenses to the team before purchasing
3. _____ Announces to members early when meeting fees are due
4. _____ Collects chapter meeting fees consistently
5. _____ Announces members with late chapter fees in private or in the meeting if necessary
6. _____ Pays the venue in a timely fashion
7. _____ Manages the speaker rotation for the chapter
8. _____ Uses BNI Connect for the speaker schedule, so members receive reminders
9. _____ Announces the speaker rotation for the following 6 weeks so members are prepared
10. _____ Is encouraging two contact sphere members to present during one meeting
11. _____ Has back up speakers just in case a presenter is absent on their feature presentation day
12. _____ Is actively engaged on the Passport to Success Program
13. _____ Knows when new members have attended MSP so they can get into the speaker rotation
14. _____ Encourages members to update their speaker bio before they do their feature presentation
15. _____ Reads the Verbatim Script for the visitors so they are informed of the fees

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Team Activity Worksheet – Membership Committee

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1. _____ Has monthly meetings with the entire MC team to discuss opportunities
2. _____ Processes applications in a timely fashion (2 weeks or less)
3. _____ Keeps applicant updated on the status of their application
4. _____ Asks the members for feedback on new applicants
5. _____ Has a clear system to decide if a member should get renewed or not
6. _____ Announces renewals during the chapter meeting
7. _____ Allows the members to give feedback on renewing members
8. _____ Is consistent with Quarterly Member Check-ins (ask yourself if you have been checked in on)
9. _____ Communicates to members where they could improve 4-6 months BEFORE renewal
10. _____ Announces dropped members of the chapter AFTER the visitors have been excused
11. _____ Proactively works with ED Coord. to communicate items to members
12. _____ Is effective at not allowing a member to cover multiple business categories
13. _____ Keeps all member issues confidential
14. _____ Will recuse themselves of any involvement in an issue when necessary
15. _____ Is adept at shutting down gossip or drama (you will know this if you do not hear about things)
16. _____ Actively engages in the Passport to Success Program
17. _____ Communicates with the VP on renewals to put into BNI Connect
18. _____ On transfers, contacts previous chapter and fills out transfer form
19. _____ Puts members on probation when necessary
20. _____ Coordinates with Mentor Coordinator when “seasoned” members need assistance

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Team Activity Worksheet – Visitor Hosts

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1. _____ Welcoming Visitor Host – arrives 15 minutes early to each meeting
2. _____ Sets up a great looking visitor registration table (in-person)
3. _____ Has a packet of member cards to give to guests of the chapter (in-person)
4. _____ Welcomes both members and guests with warmth and enthusiasm
5. _____ Has breakout rooms set up for visitors and members to network. (Zoom)
6. _____ Enters the visitors into BNI Connect on the spot via internet access (saves everyone time)
7. _____ Collects two business cards of the guests or renames visitors on Zoom
8. _____ Politely collects any fees from the guest and gives them a brief description of their next steps
9. _____ Turns over the guests to the connecting visitor host to introduce them to their contact
10. _____ Will often take the guest over to the member table to see all the resources available
11. _____ Visitor Orientation Host – is prepared with the application process and visitor orientation worksheet as President excuses them from the meeting
12. _____ Has an area or breakout room for visitors after the meeting
13. _____ Covers all three sections of the Welcome to BNI Worksheet to ensure the visitor has a full understanding of what the expectations are
14. _____ Shows visitors the online application process
15. _____ Spends 15 minutes or less with the guests so they can return to networking with the members
16. _____ Follows up with each visitor and thanks them for attending and asks for a reservation for next week as well
17. _____ For any visitors entered before the meeting, they “click off” the visitors as attended in BNI Connect to ensure they show up on the reports

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Team Activity Worksheet – Growth Coordinator

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1. _____ Works with Event Coordinator on all Growth events for the chapter
2. _____ Assesses contact spheres and attends contact sphere meetings to check in
3. _____ Looks for voids in contact spheres and encourages the group to bring those visitors
4. _____ Promotes Visitor Days and Stack Days and has a plan to have them be extremely successful
5. _____ Utilizes the BNI Game as an incentive to grow the chapter
6. _____ Interacts with new members to get them connected to their contact sphere members
7. _____ Has a current professions list as to who they are looking for in the chapter and communicates with membership team to announce it
8. _____ Sets out name tents for professions they are looking for, so members see it weekly
9. _____ Has a specific goal of how many new members they are looking for
10. _____ Proactively participates in the passport to Success Program
11. _____ Encourages members who have not sponsored a member to the group to bring visitors
12. _____ Shares with new members how one of the best activities they can do as they get started is to bring visitors to the chapter – referrals will take time – visitors they can bring immediately
13. _____ Demonstrates to members how to invite with the BNI App.

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Team Activity Worksheet – Education Coordinator

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1. _____ Delivers a well prepared, informative EC moment in 3-4 minutes
2. _____ Attends the Leadership team meetings to create EC moments relevant to the chapter's needs
3. _____ Engages the members by asking questions, being interactive, or bringing fresh ideas
4. _____ Has a strong focus on BNI material such as all the books available to them
5. _____ Encourages members to listen to BNI Podcasts by sharing examples of them during EC moment
6. _____ Has other members present to give a slightly different voice on specific items
7. _____ Engages with new members in the Passport to Success Program
8. _____ Has a complete library of BNI materials that members can check out (leaving a \$20 check)
9. _____ Creates a monthly theme of ED Moments to cover large topics over time
10. _____ Promotes videos from Dr. Ivan Misner, or BNI Connect videos
11. _____ Is proactive during BNI Games or Contests to ensure members are getting CEUs
12. _____ Uses the traffic lights or PALMS report to create material specific to the chapter's needs
13. _____ Uses visuals, humor, or enthusiasm in their presentations
14. _____ Teaches the members how to use BNI Connect better
15. _____ Teaches members how to use the BNI Mobile App better

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Team Activity Worksheet – Event Coordinator

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1. _____ Plans out two social events for the chapter to have fun together as a team
2. _____ Plans out two service events where members can give back to the community as a team
3. _____ Plans out two growth events such a Full Visitor Days, Stack Day Months, etc.
4. _____ Plans out two training events such as Advanced Trainings or Room Full of Referrals, for the entire chapter
5. _____ Signs members up for Regional Events such as BNI LT, MSP, Advanced Trainings
6. _____ Does more than just announces events – coordinates people to go together
7. _____ Ensures that members run all announcements through them to save time at the end of the meeting
8. _____ Creates press releases for the chapter to receive recognition in the community
9. _____ Proactively participates in the Passport to Success Program
10. _____ Encourages the BNI Game especially during the summer months or over holidays
11. _____ Utilizes sign-up sheets at the visitor host desk for upcoming event registration
12. _____ Creates groups or teams who go to Chamber events, Rotary, or meet ups to generate buzz about your chapter

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Team Activity Worksheet – Mentor Coordinator

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1. _____ Selects a team of people to be great mentors
2. _____ Assigns mentors to new members once they are inducted into the chapter
3. _____ Tries to attach mentors and mentees with similar businesses, values, or behavioral styles
4. _____ Has regular check ins with mentors to see how the mentees are coming along
5. _____ Shows new members how to use Business Builder to complete MSP within their first 30 days
6. _____ Proactively participates in the Passport to Success Program
7. _____ Ensures new members have completed the Passport to Success Program within 90 days
8. _____ Works with MC on seasoned members who may want/need to improve their skill level
9. _____ Encourages members to continue to learn about networking and giving referrals
10. _____ Encourages members in the red or gray to do specific 1-2-1s with mentors on how to get into the green on the member traffic lights
11. _____ Completes a final check in during month 8-9 with New members to ensure they are renewing

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