BNI Slips Program Overview

BNI has created mechanisms to measure and track members' success and activity. Combined, we call this the BNI Slips Program. Individually, the program consists of tracking One-to-One meetings, Networking Education, (CEU’s) Referrals, and closed business, (TYFCB).

We have 2 ways for members to report their activity, through paper slips that can be filled out and passed at a weekly chapter meeting, or online slips that can be entered through BNI Connect during the week preceding the chapter meeting.

Slips Completion Process

**Paper Slips**: Paper slips are to be completed before the meeting and handed in during the referral and testimonial portion of the meeting. The slips will be collected by the chapter Vice President and input manually into BNI Connect following the meeting. Note that only statistical information about the activity will be recorded when utilizing the paper process. Instructions for how to input the PALMS in BNI Connect can be found [here](#).

**Online Slips (preferred)**: Members may enter their activity into BNI Connect using the online slips process. All slips entered during the time between meetings will automatically be input into the upcoming week’s PALMS report for the Vice President to review and approve. In addition to the statistical information, the full details of the transaction will be available for the member to review through BNI Connect. The member may also make changes to the details of each slip up until the time that the PALMS is approved and officially submitted by the Vice President. When submitting slips online, members should continue to announce and celebrate their weekly activity during the referral and testimonial portion of the meeting, though for most activity a paper slip is no longer necessary. The member may utilize the “Print Your Weekly Slips” function to turn in a paper referral to be included in the door prize drawing for that week’s meeting.

Following is a sample of the actual form and a purpose and explanation as to why we track this information. Followed by step-by-step instructions for completing both the paper slips and the online version.
Purpose: One-to-ones are key to relationship building and learning how to pass referrals to your members. We track this information to measure the commitment level of members to gain the knowledge and develop a comfort level to generate referrals.

One-to-one follow-up Completion Process:

Paper Slip Process: The member who initiated the One-to-one should be the person completing the form and is responsible for submitting it to the Vice President at the chapter meeting following the One-to-one appointment.

The paper form will be light blue in Color, a single sheet pad form and the same size as the referral slip. The Vice President will credit in BNI Connect each member who was present at the one-to-one.

Recommended Reporting: This process may vary by region. Turning in the One-to-one forms to the Vice President can be done before, during or immediately after the weekly chapter meeting.

Online Slip Process: Only one member of the 1 to 1 pair needs to input the slip online, usually the person who initiated the meeting. The online slip may be entered at any time between chapter meetings, but must be completed before the end of the chapter meeting to be counted for the current week’s PALMS report. To fill out the form, click on the “Submit 1 to 1 Slips” link on the My BNI Business screen and complete all necessary fields. For detailed instructions for the online 1 to 1 slips, click here.

Note: This does increase the number of One-to-ones done in the chapter, but it is important to recognize and give credit to each member. The One-to-one reporting program is NOT to be used verbally as a replacement for giving a referral or a testimonial.
Chapter Education Units (CEU)

Purpose: There is a direct correlation between networking education you complete and revenue you generate from referrals. We track this information to measure a member’s engagement in networking education to further enhance success as well as contribute to the success of others in their chapter.

Chapter Education Units (CEU) Completion Process:

Paper Slip Process: The member who completed the credits should complete and submit the form to the Vice President at the chapter meeting. Remember to put your name and date on the form and include all CEU’s completed since the last form you submitted.

This form will be goldenrod in color, a single sheet pad form and the same size as the Referral Slips. The Vice President will then input the credits in BNI Connect to the individual whose name is on the form.

Recommended Reporting: This process may vary by region. Turning in the CEU forms to the Vice President can be done before, during or immediately after the weekly chapter meeting. The CEU reporting program is **NOT to be used verbally as a replacement for giving a referral or a testimonial.**

Online Slip Process: The online slip may be entered at any time between chapter meetings, but must be completed before the end of the chapter meeting to be counted for the current week’s PALMS report. To fill out the form, click on the “Submit CEU Slips” link on the My BNI Business screen and complete all necessary fields. The member should input the quantity for each course completed, the total number of credits will be calculated automatically. For detailed instructions for the online CEU slips, click [here](#).
Purpose: Referrals are the basis of BNI. Members join and stay in BNI based on the opportunity to generate referrals for their business. Tracking referrals is the starting point for members to measure the impact BNI has had on their business. Referral slips are used to 1) report and track referrals members pass and to 2) record when a member has a 1st time visitor attend.

Referral Slip Completion Process:

Completion: Complete all the information on the slip, including whether the referral is an “inside” or “outside” referral and how the member should contact the referral. The “White” copy should be passed to the member, the “Pink” copy should be turned in to the Chapter Vice President, and the “Yellow” copy you should keep.

The Vice President then inputs the referral in BNI Connect.

Note: 1) Complete the form with as much information you want to when receiving a referral. 2) Use your “Yellow” copy to use as a follow up to ensure your referral was contacted and how you can further assist in turning the referral into closed business.

Recommended Reporting: During the “I Have” portion of the meeting, the member should announce the referrals they have and give the “Pink” copy to the Vice President. Getting the Vice President the “Pink” copies may vary from region to region.

Online Slip Process: The online slip may be entered at any time between chapter meetings, but must be completed before the end of the chapter meeting to be counted for the current week’s PALMS report. To fill out the form, click on the “Submit Referral Slips” link on the My BNI Business screen and complete all necessary fields. Once the referral has been input, the member for whom the referral is intended will immediately receive an email notification with the details of the referral as well as the contact information of the member giving the referral. For detailed instructions for the online referral slips, click here.
Purpose: Thanking and recognizing members who pass referrals is a key component to a successful networking program. This form is used to recognize and thank members who passed referrals that turned into business. It also allows members to track revenue they received from completed business generated from a BNI referral.

“Thank you for closed business” Completion Process:

Completion: This should be completed by the member who closed the business. “Thank you to:” is the member that gave the referral that resulted in closed business. See the “purpose” section of this document for definition of what $ amount is to be reported.

This form will be light green in color, a single sheet pad form and the same size as the Referral Slips. The Vice President will then input the $ amount in BNI Connect to the individual whose name is on the “Thank you to” line.

Note: By assigning this amount to the person who gave the referral resulting in the business, this will preserve confidentiality of each individual’s income. In addition, this will show each member’s value as a “referral giver” to the other members of the chapter.

Recommended Reporting: Members turn in the “Thank you for closed business” forms in the same way they turn in the referral slips during the referral portion of the meeting.

Note: The Thank you for closed business reporting program is NOT to be used verbally as a replacement for giving a referral or a testimonial.

Online Slip Process: The online slip may be entered at any time between chapter meetings, but must be completed before the end of the chapter meeting to be counted for the current week’s PALMS report. To fill out the form, click on the “Submit TYFCB Slips” link on the My BNI Business screen and complete all necessary fields. In the case of TYFCB, only the person being given credit for generating the TYFCB (the Giver) will be identified in the PALMS report, the person who received the income will remain anonymous. For detailed instructions for the online TYFCB slips, click here.
“Thank you for closed business” Reporting Guidelines:

This is not meant to be an exact science for reporting purposes. The goal is to have a consistent reporting system throughout BNI worldwide to recognize those members who pass qualified referrals, while conservatively reporting the amount of business recognized by our members. Below is an explanation of what is to be reported based on what type of business you are in:

❖ **Commission Based Sales**
   If you are commissioned, put down your gross commission figure. Examples:
   - Insurance: P&C
   - Realtors
   - Insurance: Health Care
   - Mortgages
   - Online Sales
   - (such as greeting cards)
   - Investments
   - Insurance: Life
   - Payroll Services

❖ **Service Providers**
   If you provide some type of service, put down the gross amount you charged for your service. Examples:
   - Website Designer
   - Massage Therapist
   - Business Coaching
   - Doctor
   - Pest Control
   - Pool repair/leak detection
   - Title Service
   - CPA
   - Photographer
   - Salon/Spa
   - Attorney
   - Computer Services

❖ **Product Providers**
   If you sell or install a product, put down the total cost to the client of the product plus service costs. Examples:
   - Plumbing
   - Roofing
   - Custom Wood Products
   - Promotional Products
   - Printing
   - General Contractor
   - Flooring
   - Heating & Cooling
   - Alarm Systems

❖ **Banking**
   Bankers do not get compensated based on the actual business they generate. Please follow the below definitions to report closed business for non-commissioned referrals to banks.
   1) Loans – Report the interest that would be generated if the loan would go full term
   2) Deposits – Report 10% of the initial amount to open an account
   3) Lines of credits – (i.e. credit cards, home equity loans, commercial lines of credit, etc.) report 10% of the line amount
   4) Other bank services – (i.e. merchant services, on-line banking, etc.) report a flat dollar amount of $250

❖ **Other**