

# NEW MEMBER ORIENTATION CHECKLIST



New Member's Name: \_\_\_\_\_ Date of Orientation: \_\_\_\_\_  
Occupation/Profession: \_\_\_\_\_  
Sponsor/Mentor \_\_\_\_\_  
Member Conducting Orientation: \_\_\_\_\_

**Check off each item below as it is discussed and explained.**

## BNI Dues and Fees

- Annual Dues – Amounts, How Paid, To whom paid, For what
- Chapter Facility Fees – Amount, Due Dates, How Paid, To whom paid, For what

## BNI Member Orientation Guide

- 60 Second Introductions
- Dance Cards
- How to give good referrals
- How to get good referrals
- How to get new members

## BNI Member Policies

- BNI Philosophy
- BNI Code of Ethics
- General Policies
- Administrative Policies

## BNI Program Guidelines

- Substitute Policy
- Chapter Substitute List
- Member(s) to Contact when absent

## BNI Chapter Business Meetings

- Chapter Committee Meetings Schedule
- Weekly Chapter Business Meeting Agenda
- Referral Slip Supplies and Completion

## BNI Leadership Team's Support Roles

- President
- VP
- Secretary/Treasurer
- Education Coordinator
- Mentor Coordinator
- Host/Hostess
- Membership Committee

## BNI Resources

- Website: BNI.com & BNIMA.com
- Newsletter – Sign up for SuccessNet
- Awards, Badges, Notable Networker
- Press Releases

## Chapter Resources

- Chapter Education
- Business Card Box
- Other: \_\_\_\_\_

## BNI Membership Success Program MSP Training Requirement

Date Scheduled: \_\_\_\_\_

## Chapter Requirements

- Chapter Dance Card Procedure
- Chapter Referral Follow Up Requirements & Tracking
- Referral Forms

## Required Forms

- Chapter Bio Sheet
- GAINS Profile
- Launching Pad Questionnaire
- Sphere of Influence Worksheet
- BNI Members' Success Tracking Form

## New Member Kit

- Name Badge
- Lapel Pin
- Card Case
- Orientation CD
  
- Member Orientation Guide Brochure
- Member Policies Brochure