



One-to-One Planner

Referral Strategy Sessions

Get to Know Your Team and Increase Your Referrals



Email your worksheets to the person you will meet with next. The worksheets in this manual include the Member Bio Sheet, GAINS Exchange, Contact Sphere Planning Worksheet, and Previous 10 Customers Worksheet.

P R O D U C T I V E | E F F E C T I V E | E F F I C I E N T





Member Biography Sheet

Name: Volkan Caglar

Date: Aug 24, 2026

Business Information

Business Name: Volkan Photography Inc.

Profession: Headshot Photographer

Location: Langley, BC

Years in Business: 9

Previous types of jobs: I am a PhD and I used to be a university professor in my previous life. When I moved to Canada, I worked as a Cook, Chef and eventually I owned my own restaurant for a while in Halifax. I also worked as an IT project manager during Covid.

Personal Information

Family Information

A. Spouse / Significant Other Tugce (wife), married 15 years

B. Children 2 daughters (Maya & Lila)

C. Animals 2 birds, 1 fish, 1 dog

Hobbies: Photography :) Skiing maybe!

Activities of interest: Love breakfast picnics in summer

City of residence: Langley

How long? 5 years

Miscellaneous

My burning desire is to: I want every client, whether it's a child on picture day, a professional needing a headshot, or a family preserving a moment, to walk away feeling seen, respected, and at ease, knowing their images truly reflect who they are. I also want a huge studio :)

Something no one knows about me: I have formal training and short term experience in modelling.

My key to success: Creating a calm, pressure free experience that helps people relax, trust the process, and look like themselves in front of the camera.



GAINS Worksheet

Use this form to record GAINS for yourself or others with whom you want to build a relationship. Use one form per individual; add sheets as needed. Date each entry to know how old the information is.

NAME: Volkan Caglar

DATE: Aug 24, 2026

Goals:

Goals are the financial, business, educational, and personal objectives you want or need to meet for yourself and for people who are important to you. The best way to develop a relationship is by helping someone achieve something that's important to them. If you do, they'll remember you when you need help achieving your goals.

To grow long-term, referral-based relationships with professionals who value trust, consistency, and taking good care of their clients.

Accomplishments:

Some of your best insight into others comes from knowing what goals they have achieved, what projects they've completed, what they have accomplished both for themselves and for others. Your fellow member's knowledge, skills, experiences, values, and beliefs can be surmised from their achievements.

Built a photography business focused on repeat clients and referrals, working with daycares, families, and professionals who value a calm, reliable experience.

Interests

Your interests – the things you enjoy doing, talking about, listening to, or collecting – can help you connect with others. People are more willing to spend time with those who share their interests or know something about them.

Family time, creating meaningful printed photographs, personal growth, and building thoughtful, sustainable businesses.

Networks

How would it benefit you to know what other networks, both formal and informal, that your fellow members are involved with? A network could be an organization, institution, company, civic, religious or professional associations, etc.

Local families, daycare and school communities, small business owners, professional service providers, Langley Chamber of Commerce. Soon Rotary International.

Skills

As for Skills, the more you know about the talents, abilities, and assets of the people in your network, the better equipped you are to find competent, affordable service when you or someone you know needs help.

Helping people feel comfortable on camera, clear and gentle direction, attention to detail, and delivering a smooth, stress-free client experience.



Contact Sphere Planning Worksheet

Contact Spheres are made up of businesses or professions that naturally provide a source of referrals for one another. They are in somewhat related but non-competitive businesses. Businesses in the same Contact Sphere have a symbiotic relationship in that they support and enhance one another.

My Contact Sphere is Marketing & Professional Services

My Contact Sphere Members

1. HR Managers of medium - large companies
2. Small Business Owners
3. Mortgage Brokers
4. Realtors
5. Insurance Advisors
6. Financial Planners
7. Marketing Consultants
8. Social Media Managers
9. Business Coaches
10. Lawyers

Contact Sphere Top 3

What other three professions would help you round out your Contact Sphere? Write them down in the space below.

Profession 1:

Residential Real Estate Agent
2 - 10 years in
Active on LinkedIn / Instagram
Invests in Marketing

Profession 2:

Mortgage Broker
Client facing but not seeing their clients
Regularly working on their branding

Profession 3:

Financial Advisor / Insurance Advisor
Care deeply about image & credibility
Regularly updates marketing materials

Make a commitment to your One-to-One partner to help fill their Contact Sphere by inviting people to BNI that are in his/her top 3.

Commitment:



Previous 10 Customers Worksheet

Imagine how you can increase the referrals you receive by helping your BNI referral partner understand how to find more customers like the ones listed below!

1. List your previous 10 customers below.
2. Select the ones that are ideal clients or a good referral for you.
3. Write your answers to questions in the spaces provided.

Customer, Industry or Description		What did you do for them? If an Ideal Client, describe why.	Ideal Client
1	BC Milk Marketing Board	Built a headshot photography station in their office and photographed all the team with the same light and backdrop for a cohesive look. Ideal client: photographed 20 people in 1 hour, good income and efficient use of time for all parties.	☒
2	BC Greenhouse Growers	I photographed their annual conference.	☐
3	BC Turkey Marketing Board	Built a headshot photography station at their annual conference and photographed all participants (~200 people) with the same light and backdrop for a cohesive look. We also photographed the two day conference. Ideal client: good level of income and efficient use of time for all parties.	☒
4			☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			☐



Commit to take action!

The success of the One-to-One Business/Strategy Meeting depends on how well you follow through with the actions you have agreed to take.

FIVE Introductions or Prospects I will work on making for _____:

Name, Company or Industry:	Conversation Starter (What to say):	By When?

Identify one long-term goal/referral that your BNI referral partner can help you achieve: _____

What action steps need to be taken to make this long-term goal/referral a reality?

By when? _____

Date of follow up One-to-One Business/Strategy Meeting? _____



Let's review the system!

It's as simple as scheduling one One-to-One, Business/Referral Strategy Session each week with one of your fellow BNI Members.

Set Time, Date and Place

- Restaurant
- Someone's Office (preferred)
- Virtual (Zoom, MS Teams, Etc.)

Pick a time to meet. It's better if you meet at someone's office because you can learn more about their business that way.

Prepare Your Worksheets

- Member Bio Sheet
- GAINS Exchange
- Contact Sphere Worksheet
- Previous 10 Customers Worksheet

Take the time to prepare your worksheets in advance of your One-on-One Business/ Strategy Meeting. The worksheets will help you share important information with your referral partner about your business and how to find referrals for you. Update them every 3-6 months.

Exchange Info Before the Meeting

Email your four worksheets to your referral partner before the meeting. Agree on and set a simple agenda for the meeting to honor their time commitment.

Bring Worksheets

Bring the same materials to the One-to-One that you emailed earlier. You can also bring other materials that could help you help each other. For example, you could bring testimonials from satisfied customers, or brochures that your referral partner could display on your behalf.

Meet with Your Business Partner

Meet with your BNI business partner and learn as much about how to find referrals for them as possible. Use the worksheets as a foundation to build upon. Use this time wisely.

Commit and Agree on Goals

- One short-term referral
- One long-term referral
- Invite prospects from your partner's Contact Sphere Top 3 list
- Schedule next meeting (possibly at the other person's place of business)

Make a commitment to help your BNI business partner with referrals, both short-term and long-term. At the same time, invite prospective BNI Members from your partner's Contact Sphere Top 3 list to help them build their network through BNI and their Contact Sphere. If you met at someone's office plan to meet at the other person's office the next time.

Follow-Up

Follow up within 2-3 days of your meeting. Let your referral partner know how your action items are coming along and what other plans you may have to help them.