

Referrals on the Fox

What we are:

Referrals on the Fox is a networking group designed to help its members increase their business by taking advantage of the best advertising of all: word of mouth. We educate each other about each of our businesses, and by doing so, we are able to create a sales force for each and every member in the group. We also understand that in addition to what we gain from our group, our company's growth is fueled by the community around us, and as such, we use our resources to volunteer and participate in community activities in the surrounding areas.

Mission Statement

As a group of businesses in the Fox Valley community, we educate ourselves to provide those we service with a trusted option from professions outside the scopes of our own business. By establishing trusted relationships with members from other local businesses, we are able to provide a solution to meet all of our client's needs.

Meeting Time:

Noon - 1:30 PM, First & Third Thursday of Each Month

Location:

Old Towne Pub & Eatery

201 W. State St.

Geneva, IL 60134

Ver 2.0 1/1/15

Table of Contents

Group Bylaws & Membership Protocols

Membership Highlights.....	3
Attendance Policy.....	3
Typical Agenda.....	3
Leadership Team Protocol.....	3
Leadership Team & Roles.....	4
Group Materials.....	5
Visitor Protocol.....	5
New Applicant Protocol.....	5
Referrals.....	6
One-on-Ones.....	6
Lessons Learned.....	7
Spotlight Speaker.....	7

Memberships Highlights:

- No cost to join
- Only one member of each profession is allowed to join

- Members may only belong to this referral group (Chambers are permitted)

Attendance Policy:

- Attendance is expected at every meeting
- Each member is allowed a maximum of 4 unexcused absences a year
- Each member may only miss 2 consecutive meetings; the third consecutive miss will lead to membership review
- Members may send a substitute to avoid an absence (use within reason)
- Tardiness will be monitored; Patterns of tardiness will warrant a membership review
- Memberships reviews will be held at the discretion of the membership committee, and may result in probation and/or dismissal

Meeting Agenda:

- Open Networking - 15 minutes
- Meeting Introductions - 5 minutes
- Sixty Seconds of Fame - 20 minutes
- Lessons Learned - 5 minutes
- Spotlight Speaker - 10 minutes
- Referral Rundown - 20 minutes
- CommNet - 5 minutes
- Member Announcements - 5 minutes

Leadership Team Protocol:

- The Leadership Team is made from current group members
- The Leadership Team will be expected to perform all of the following listed roles, as well as others that may be required to maintain efficient, group function
- The Leadership Team holds office for a twelve month period

- All group members are eligible to hold office on the Leadership Team
- In instances of multiple members seeking the same post, the current Leadership Team will work with the individuals involved to resolve the situation
- The Leadership Team is expected to meet at least once per quarter to assess the group and discuss any changes that may need to be made

Leadership Team & Roles:

- President
 - Conducts the meeting
 - Oversees Visitor Host
 - Calls all new visitors
 - Oversees Membership Team
 - Co-handles all final membership decisions
- Vice President
 - Oversees Community & Volunteer Coordinator
 - Maintains Spotlight Speaker schedule
 - Maintains Lessons Learned schedule
 - Monitors attendance & tardiness
 - Tracks referrals & member One-on-Ones
 - Co-handles all final membership decisions
- Membership Team (Comprised of three members)
 - Reviews new applications
 - Calls applicant references
 - Approves new applicants
 - Handles reviews for current members
 - Maintains “Wanted” list

- Is expected to meet as needed to discuss any membership issues
- Visitor Host
 - Arrives ten minutes prior to meeting time
 - Maintains materials
 - Greets visitors and collects Visitor Information Forms
 - Makes follow-up calls to new visitors
 - Communicates all visitor information with Membership Team and President

- Community/Volunteer/Networking Coordinator
 - Researches local Community/Volunteer/Networking events
 - Presents new information to the group
 - Coordinates all group outings/events

Group Materials:

- Name Tags
 - All members are expected to wear a name tag identifying themselves and their company
 - Name tags should be visible at all times
- Personal business card book
 - Each member should have a card book to file other members cards
 - Members should update their card books at each meeting
- Group Information Book (GIB)
 - Each member's business cards will be stored and available to other members
 - Referral slips and One-on-One forms will be stored in the GIB
 - Visitor Information Forms and New Applications will be stored in the GIB
 - Lessons Learned schedule will be stored in GIB

- Spotlight Speaker schedule will be stored in GIB
- The “Wanted” list will be stored in the GIB
- A current group roster will be stored in the GIB

Visitor Protocol:

- Visitor Host will greet the visitor and provide the Visitor Information Form
- Visitor Host will then introduce the visitor by name and business to nearby members
- Visitor Host will file the Visitor Information Form and will notify the President
- President will ask the inviting member to introduce the visitor before Sixty Seconds of Fame
- After the meeting, both the President and the Visitor Host will make follow-up phone calls to thank the visitor for attending, welcome them for another visit, and answer any questions

New Applicant Protocol:

- Once a visitor has decided to commit to the group, the Membership Team will provide the applicant with an application
- The Membership Team will then disseminate the application amongst themselves for a peer review, fact check, and reference/customer check
- The Membership Team will make a decision and will notify the President & Vice President of their decision
- Once all parties have come to agreement, the Membership Team will contact the applicant to make them aware of the decision
- President will call to officially welcome the New Member
- President will then welcome and introduce the New Member at the next meeting

Referrals:

- Our group was formed to help pass qualified referrals from one member to another
- Although titled as referrals, we are looking for an introduction, more so than a lead
- Qualified referrals have information on both the client, as well as the client's need
- The best referrals are those with which information has been provided to the both the prospect, as well as the referred group member
- The better you know the other members in the group, the easier it will be to pass a qualified referral
- The better other members know you, the easier it will be to pass you qualified referrals
- The best way to get to know other members is to meet them in One-on-Ones, as well as listening attentively when speakers are giving the Sixty Seconds of Fame and their Spotlight Speaker moments.

One-on-Ones:

- One-on-Ones are your opportunity to train another member of you "sales team" on how to bring you qualified referrals
- These meetings have been found to dramatically increase the amount of qualified referrals members are able to pass amongst themselves
- Each member is responsible for setting up One-on-Ones
- You can schedule as many as you need
- The recommended format is two separate hour-long sessions between two group members
- The two sessions should be held at each group member's point of business
- During these sessions, the goal is to educate the other member about your business, the value it can bring to potential referrals, the type of referrals you are looking for, and ways to approach them
- Once these meetings have been completed, each member should fill out a One-on-One form, and then announce these meetings during the Referral Rundown session

Lessons Learned:

- Lessons Learned is generally a **five**-minute presentation that educates or motivates the group on a particular topic
- The topics can vary from those subjects such as Networking, Motivation, Organization, Branding, Philosophy, or Business Tips, etc.
- The object is to pass new information to all the individuals in the group, so that we can help each other build our businesses using successful, learned lessons in business
- Lessons Learned will also help to promote a small measure of public speaking, so as to build each members comfort level when speaking in public
- The Lessons Learned session takes place every meeting
- Each member will be expected to take on the educational role at least once per year
- Members can sign up on the form found in the GIB

Spotlight Speaker:

- This is a **ten**-minute presentation that is an opportunity for each member to take the floor and provide the group with the details of their company and business, as well as to inform the group how to provide you with quality referrals
- You can use this time to educate the group about your qualifications, your background, and your passion for doing what you do
- Among all things, make sure to focus on educating the group on how to become part of your company's sales force
- By better informing the group on what prospects you are looking for, and the best ways we can approach them, you will go a long way towards helping us all grow your business
- Each member will be expected to be the Spotlight Speaker at least once per year
- Members can sign in on the form found in the GIB

