B2B NETWORKING GROUP

EXECUTIVE TEAM GUIDELINES

Following the Overview each area of responsibility is covered in detail as a guide. Should you need further clarification, contact your Regional Support.

OVERVIEW of VICE PRESIDENT

- Official Keeper of "**REFERRAL**" slips for member participation & reconciliation

- Chapter Business Card File. It is the responsibility of each member to supply enough business cards for each member to place in their Business Card Holder. *VISITORS do not add their cards to the file until they become members. Members are encouraged to meet the visitors and exchange business cards instead of harvesting in mass from the business card file.*

- Tally & Complete Handwritten **Monthly REFERRAL Summary** or the **Excel Summary** and distribute to Members for review

Vice President Oversees Communications Chair & Publicity Chair

Details of the *VICE PRESIDENT'S* Responsibilities are outlined below as referenced above:

REFERRALS & REVENUE TRACKING:

- Vice President tabulates weekly REFERRALS and announces the number of Inside – Outside & Total REFERRALS passed and the dollar value of reconciled REFERRALS turned in at the end of each meeting.

- Vice President tracks and records the REFERRALS given and received by each Member along with the dollar value as submitted by each Member. A copy of **The Monthly REFERRALS Summary Report** (an excel version is also available) with the total of REFERRALS and dollar results are given to the membership at the end of the last meeting of each month.

- Understand and explain the REFERRALS CARD EXCHANGE (next topic below)

REFERRALS CARD EXCHANGE PROCESS:

- REFERRALS are defined as follows: **Outside Referral:** A referral from a Member who is referring someone '"outside" of the membership. **Inside Referral**: A where a Member utilizes the services of another Member. Members conducting business with other Members, helps Members to get acquainted with each other and can increase the success of the Membership (refer to online Member Handbook).

- COMPLETELY FILL OUT THE TWO PART REFERRAL CARD:

  1. Use the Lid from the VP's box – be sure a sample of a completed REFERRAL Card is taped to the upper 1/3 of the box, the yellow copy is taped in the middle and a sample of a reconciled REFERRAL is in the lower 1/3 of the box. *See "DOCUMENTING THE RESULTS" below.*

  2. Member places the WHITE copy into the lid for the REFERRAL RECIPIENT to remove as the lid is passed to each member. The Yellow is placed in the middle for the VP to tally along with the reconciled REFERRALS in the lower 1/3.

- DOCUMENTING THE RESULTS:

  1. In order for you to confirm that B2B is a viable marketing resource for your business, we encourage documenting your results. On the back of the white copy of the Referral Card, write the dollar results for that referral.

     a. The Dollar Value turned in is based on the net amount the member realizes as a result of the completion of the referral.
     b. For those categories with confidentiality protocols, ask if they can support the group by turning in a blank referral slip with the net revenue received upon completion.

  2. On the front of the white REFERRALS Card, place a LINE THROUGH the front showing that it is COMPLETED.

  3. Pass the COMPLETED REFERRALS CARD in to the VP for recording. If a REFERRAL does not pan out within 4 - 6 wks of receiving it, turn it in as a $0 or *"DEAD"* REFERRAL, if it pans out at a later date a new referral can be written and reconciled at that time.

SOME THINGS B2B DOES NOT DO

WE DON'T CHARGE FINES, FOR ANY REASON DURING THE MEETING
(we only charge a bookkeeping late fee for delinquent fees.)

WE DO NOT ENDORSE OR SPONSOR ANYTHING OR ANYONE

No part of the meeting time is to be given to fundraising activities *(except that of our non-profit member as part of their 30 second & 10 minute presentations)* political endorsements - issues or special interest groups. This is considered captive time that our members are paying for the purpose of promoting their businesses only. Any discussion of unrelated issues should be handled one on one or following the close of a meeting when members have the option of participating or not.