

## Coffee Connections Leads and Referral Group Polices and Procedures

### I. Mission

Leads Groups directly contribute to the economic development of the Tempe area by increasing the business and profits of Chamber Member businesses/organizations through structured, relational networking, and the exchange of referrals and leads.

### II. Organization

Coffee Connections Leads Groups are under the umbrella of the Business Development Council (BDC) of the Tempe Chamber of Commerce. A Leads Group Committee, consisting of the facilitators of each of the Chamber's Leads Groups, Business Development Council Chair, and the Director of Business Development for the Tempe Chamber, shall meet as required to ensure the overall success of the Leads Group program.

### III. Groups/Schedule

All groups meet twice a month at a regularly scheduled, mutually convenient time established with the Chamber Staff.

#### A. Coffee Connections 1

2<sup>nd</sup> & 4<sup>th</sup> Wednesdays, 7:15am – 8:30am

#### B. Coffee Connections 3

2<sup>nd</sup> & 4<sup>th</sup> Tuesdays, 11:45am – 1:00pm

### IV. Meetings

A. If the meeting falls during mealtime, members are encouraged to purchase meals from the host meeting location.

B. Each meeting can have one featured speaker. The speaker will be allowed up to 15 minutes as determined by the group facilitator to tell about their company in a broader scope. Those interested in being the featured speaker should contact the group facilitator to be put on the list.

C. At each meeting:

- a. Thirty-second individual introductions by each member/guest about what they do and what would be a good lead
- b. Each member should quickly give the group feedback on prior leads and testimonials
- c. Facilitator will report on numbers of leads generated the prior meeting

D. Meeting agenda will be set by the facilitator.

E. Bi-Monthly, groups are encouraged to host an after-hours social at a Chamber Member restaurant or club, to be paid for by members of the group.

## V. Member Qualifications

A. Only one representative per business category may participate in any group. Representatives must choose (1) "Primary" category.

1. The Tempe Chamber Leadership Team may occasionally authorize a member to occupy a second category providing there is not a member currently occupying that category, and until the category is filled by a member that desires the "Primary Category".

2. In order to represent a category in a Leads Group the member must be listed under that category with the Chamber.

3. A prospective member may be placed on a wait list if his/her business category is full.

B. Any business/organization representative seeking membership in a Leads Group must:

1. Be an official representative of a business/organization which is an active and current member of the Tempe Chamber of Commerce.

2. Be presented to the respective group's Tempe Chamber Leadership Team to ensure there is no conflict among the current membership.

3. The Tempe Chamber Leadership Team, in consultation with the Chamber Leads Group Coordinator, will have final determination on potential conflicts.

C. Only one representative per business/organization may participate in a specific Leads Group.

D. To avoid conflicts of interest, members may only be involved in one Chamber Leads Group.

E. In rare instances, the Tempe Chamber Leadership Team may deny the membership of any potential member based on past performance in another Chamber Leads Group and/or a negative experience(s) with another member of the group.

F. A \$75 non-refundable enrollment will be billed to each member.

## VI. Member Responsibilities

A. A member is allowed two unexcused absences per quarter. A third unexcused absence may result in termination of membership. A Company Representative (a substitute) may attend in the Member's absence, but the intent is for the Member to establish relationships in the group.

- B. During each month, bring an average of at least (1) lead. Guests who are potential members of the Chamber or the Leads Group count as a lead.
- C. During each month, complete an average of at least (2) one-to-one meetings with other Members of the group. Meetings with Members of other leads groups are allowed.
- D. Respond to all *personal leads* within 24-hours.
- E. An “extended leave of absence” will be reviewed by the Tempe Chamber Leadership Team on a case- by-case basis in order to hold the Member’s seat in their respective business category.
- F. To remain a part of a leads group, one must be referring leads. Activity for each person will be monitored. All members are expected to provide valid business leads/referrals on a regular basis. There will be no set quota, but the member will be expected to actively participate on a continuing basis.
- G. Members should develop and deliver warm and legitimate leads to other members. If time sensitive, members should contact the appropriate member immediately and then record the lead via lead slips promised.

## **VII. Member Expectations**

- A. Be punctual, as respecting the group’s time will establish credibility.
- B. Be prepared to briefly introduce yourself (30-second commercial) and your business/organization and share what is a good lead/referral for you.
- C. Be prepared to thank other members for leads resulting in closed business or potential business. Closed business will be reported in “Annual Dollars” to the group leaders.
- D. All Members are encouraged to give a 15-minute presentation (including Q&A) on your business/organization at least once a year.
- E. Do not wait until meetings to present leads, but always complete a Lead Slip to ensure proper credit and documentation.
- F. Bring an ample supply of business cards to each meeting.

## **VIII. Accountability**

- A. If a new member does not meet the minimum requirements in their FIRST quarter of membership, he/she may be automatically dropped from the group at the Tempe Chamber Leadership Team discretion.
- B. If a member representative should leave his/her Chamber member business/organization, the business/organization has 30 days to find a replacement representative or forfeit the exclusive category position in the group.

- C. If an established member does not meet the minimum requirements in ANY quarter, the member will be immediately subject to review by the Tempe Chamber Leadership Team. In addition:
1. When a member has missed (3) meetings in a row, he/she will receive a reminder call from the facilitator.
  2. When a member owes three (3) leads, he/she will receive a reminder call from the Facilitator.
  3. When a member owes (4) one-to-one meetings in a 2-month period, he/she will receive a reminder call from the facilitator.
  4. When a member owes five (5) leads or is not meeting the attendance requirements in a quarter, he/she will be subject to review by the Tempe Chamber Leadership Team and may be dropped from the group. No refunds will be given.
- D. Dropped members may rejoin the group only after review by the Tempe Chamber Leadership Team.

## **IX. Guests**

- A. Prospective Chamber Members may only attend two meetings of a leads group before deciding to apply.
- B. Members are encouraged to bring prospective new members as guests.
- C. To become a member of a leads group, guests need to fill out the Coffee Connections Membership Application Form and submit a \$75 annual membership fee to the chamber staff.
- D. Guests will pay for their own meal.

## **X. Communications/Contact Information**

- A. Group emails may only be sent from the Chamber office and/or from facilitators of the group unless pre-approved by the Tempe Chamber Leadership Team. And then, only the facilitator of the group may send the emails.
- B. To guard contact information for the benefit of the members, rosters will not be distributed at meetings, but will be emailed by the Facilitator, to Members ONLY.

## **XI. Definitions**

### **A. One-to-One's – Get to Know Each Other**

A One-to-One (1:1) is a meeting scheduled outside of the Leads Group meeting, with another Member to get to know that Member on a personal level. All 1:1's are tracked and reported to the group. These meetings can be 45 – 60 minutes long to allow both Members to speak. Each Member should plan to spend about 20 - 30 minutes talking about themselves and their business model. NO SELLING is allowed at these meetings.

## B. Lead – Could Lead to Closed Business

A Lead is a *warm introduction* of a group member’s products and/or services to a prospective client by another group member. All leads are tracked and reported to the group.

Example: “I’d like to introduce you to my friend, Sophia Rose, from 2010 Office Furniture. She is a Tempe Chamber Member and trusted professional that I network with and can help with your furniture needs.”

## C. Referral – Intro to Power Partner/Strategic Partner

A Referral is an introduction to another professional that can help the member grow his/her business. This introduction does not have to be from within the Chamber membership and all referrals are tracked and reported to the group.

Example: A Furniture representative works with the Facilities Department and so does a Telephone representative

## XII. Facilitator Responsibilities

- A. Facilitator- Duties are to run the weekly meeting; collect lead slips; keep attendance; bring the Business Card Book (Book contains all Member business cards and is passed at each meeting for members to refill each meeting); contact any member who has been dropped from the group or in danger of being dropped
- B. Co-Facilitator- Takes over Facilitator’s responsibilities if Facilitator is absent; is planned successor to the Facilitator; develops new members; greets guests and communicates the new member application process; receives and reviews new member applications; manages speaker list; recruits external speakers for special events; maintains updated list of speakers on the website; acts as a communications liaison between the group, guests and new members; maintains member’s bios on the website

## XIII. Financial

- A. Each member will pay a non-refundable \$75 annual enrollment fee.
- B. Costs for meals will be the responsibility of each member.
- C. The group will vote on all spending that does not fall into regular financial commitments.
- D. The Facilitator or Co-Facilitator may authorize petty cash expenditures not to exceed a total of \$100.00 annually. Any future funds will require Chamber approval.

## XIV. Disclaimers

- A. Coffee Connection is a program of the Tempe Chamber Business Development Council. BDC may amend these Policies and Procedures at any time upon notice to group members

- B. Members may appeal group decisions on their continued participation to BDC within two weeks of such decision. Notice of such appeal should be sent to the BDC chair with a copy to the Chamber at [info@tempechamber.org](mailto:info@tempechamber.org). Such appeal shall be heard by BDC within 30 days.
- C. Any issues not addressed by these Policies and Procedures will be heard by BDC upon notice to the BDC chair and Chamber. BDC has the authority to enforce rules and to coordinate any necessary group votes.
- D. BDC decision may be appealed to the Tempe Chamber Board of Directors within two weeks of such decision. Notice of such appeal should be sent to the Chamber chair with a copy to the Chamber President/CEO at [president@tempechamber.org](mailto:president@tempechamber.org). Such appeal will be heard by the Board within 30 days. The decision of the Board of Directors shall be final.

**XV. Acknowledgement/Agreement**

Leads Groups are dependent upon full and active participation of their respective members. Further, membership precludes the involvement of other Chamber members within represented business/organization categories, especially in the noncompetitive groups. Therefore, failure to abide by the aforementioned rules during each quarter of membership will subject the member to review and may potentially lead to dismissal from the group.

By signing below, I am confirming that I have read the Leads Group Guidelines and agree to abide by the Guidelines to the best of my ability.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print

\_\_\_\_\_  
Leads Group

\_\_\_\_\_  
Chamber Member Business/Organization

Coffee Connections are another member service of the Tempe Chamber of Commerce. For more information:

Contact Erika Acorn at [erika@tempechamber.org](mailto:erika@tempechamber.org)