

REFERRAL GROUPS MISSION STATEMENT

We are a group of local business people with the intent on increasing sales for group members via networking.

What we do in our Referral Groups is focus our efforts to produce local referrals through a lead sharing system with like-minded Chamber members.

We do it by offering weekly, one-hour member meetings to provide exposure to your business, valuable tips and training, and a venue for “one-on-ones” that builds trust so each of us can refer our clients to each other and know that they are in good hands.

Your fellow group members become your “Salesforce” keeping you and your business top of mind if they hear a need from their clients, colleagues, friends, family, or neighbors—all people they come into contact with. And YOU become part of THEIR Salesforce by remembering them in the same way!

As our group grows, your **Relationships and Connections grow as long as your priority is to meet and get to know each member, BECAUSE... *networking meetings don't generate sales for you. It's your trusted group members who deliver referrals to you that generate sales.***

Referral Groups

Policies

I. Meetings

- A. All meetings start at 7:45 AM for Networking and in the case of an online meeting - log in starts at 7:45am. Agenda starts promptly at 8:00 AM. We strive to finish by 9:00 AM to allow additional Networking or 1-on-1s in all groups.
- B. Members arriving after 8:00 AM will forfeit their weekly commercial that week and will be marked Late.
- C. Members arriving after 8:30 AM will be marked Absent.
- D. Calendar of “non-meeting “or “dark” dates for Chamber fiscal year **2024-2025** have been generated by the Chamber of Commerce and Liaison of Referral Groups (See Appendix 1, attached). Groups will abide by this calendar or be fined. Any change to the Appendix 1 will be done by the President of the Chamber and the Liaison of the Referral Groups. Requests for any alterations of calendar are due 8 weeks MINIMUM prior the date of requested change.

II. Membership

- A. Must be a member of the Miramar Pembroke Pines Chamber of Commerce or Weston Florida Chamber of Commerce and in good standing (current membership dues paid) for the chamber the leads group belongs to. The membership leader **MUST verify Applicant is a member in good standing with** Chamber: check website, contact chamber office, etc. You should NOT consider an applicant who “will stop by Chamber office today to join” as many times they do not.
- B. All applicants must attend a leads group orientation (see Appendix 2, attached) with chamber liaison and/or the President of the chamber before being accepted to the group.
- C. Membership Fees. Fees collected will go toward marketing of the Groups and philanthropic Chamber initiatives, e.g., Goldstar Scholarship (along with the group’s individual member donations).
 - 1. \$50 one-time application fee (non-refundable payment to the Chamber MUST be submitted with application) and \$40 upon annual renewal in leads group. \$40 goes to the referral group and \$20 goes to the chamber.
 - 2. At the time that a referral group is disbanded, and the member decides to join another group within 30days, they do not have to pay one-time application fee to join the referral group.

Referral Groups

Policies

3. Additional annual fees, if any, must be voted on by Leadership, approved by Chamber of Commerce President and Liaison, and communicated to Group Members 8 weeks prior to requested implementation.
 4. Only one person per profession is permitted to join. If there is an opportunity in certain industries/occupations to have more than one person per profession (e.g., Real Estate, Law, Insurance, Medical Sciences, Finance, Banking, among others), Leadership will make the final decision and determine which part of a similar/same profession each person will represent. There must be enough potential referrals to support the approved categories of Member's occupation.
 5. Applicants with multiple categories in their profession must represent to their Group the primary occupation and that for which they joined the Chamber.
 6. Applicants must work full-time in their primary occupation.
 7. Applicants must have at least one year experience in their occupation.
- D. Members cannot belong to any other "exclusive" networking groups (e.g., BNI, NPI, Go-to Networking or any other Chamber Referral groups). However, other employees of the same company can join other exclusive Referral Groups.
- E. Term – for purposes of membership and absence tracking policies, term periods are 6 months (July 1 – December 31 and January 1 – June 30) to be consistent with the Chamber fiscal year. Absences and productivity expectations will be prorated from the date of Member's actual induction.
- F. No elected official may serve in any Leadership position in any Referral group. This is a Board of Directors policy.

III. Attendance

- A. Members are required to attend all scheduled weekly meetings.
- B. Members are expected to arrive on time and stay for the entire meeting, taking advantage of early Networking and after meeting Networking or performing 1-on-1s.
- C. Absences and Tardiness - Chair and Leadership MUST review absences every month to make sure members are adhering to the policy.

Referral Groups

Policies

1. Members are allowed up to a MAXIMUM of 6 absences per 6-month term for a non-Tuesday Group and a MAXIMUM of 4 absences per 6-month period for a Tuesday group. Members of Tuesday Groups (as all other Groups' Members) are strongly advised to attend the Monthly Chamber Breakfast to recruit, network for themselves and their group, and invite guests to visit their groups. A substitute is permitted. If a substitute is used, it will not be considered an absence. Three late arrivals or leaving before 9:00AM (or combination) shall be considered one absence. **Any local Group changes to this attendance policy must be requested 30 days in advance and a majority vote of Leadership and approval of President and Liaison is required.**

a) Substitutes must give the weekly commercial for whom they are subbing-Not a testimonial for the person.

b) No current member of any chamber referral group may substitute in another Chamber Referral Group in Miramar Pembroke Pines or Weston.

c) A person may not substitute more than 3 times in any one group.

2. After 3 absences, member will receive a notice from the Leadership Board expressing concern as to excessive absences.

3. Allowed absences will be prorated to account for the induction date for each Member.

4. After 4 absences for Tuesday groups or 6 absences for non-Tuesday groups, maximum allowed prorated absences OR locally adjusted attendance requirements, the Leadership Board may terminate the membership and open the category to a new member.

a) Any member terminated due to excessive absence may request re-application for membership with an additional application and additional application fee; however, if approved, membership will be under probationary status and re-applying applicant member must come before Leadership to explain why there was excessive absence and why that will not be a factor the second time around. If removed a second time for excessive absence, no more application can be made to that group and that member must sit out being a member of ANY Chamber Leads Group for 12 months. If Member resigns from their Leads Group, they must also sit

Referral Groups

Policies

out 6 months before applying to ANY other Chamber Leads Group in Miramar Pembroke Pines or Weston.

5. Any combination of 3 late arrivals and/or leaving early will be the equivalent of one absence.

a) A member that arrives after 8:00 AM will forfeit the opportunity to do their weekly commercial and marked with 1 late.

b) Any member arriving after 8:30 AM will be charged with 1 Absence.

c) Any emergency or anticipation of leave must be notified in advanced to Chair to be discussed with Chamber liaison or President three weeks in advance.

IV. Participation

- A. Members are required to give a prepared weekly commercial about what they do and who would be a good referral for their business. Leadership can help with the development of this (and the 10 minute) presentation via Chair, Mentor, Membership, or other experienced Members.
- B. Each week one member will give a 10-minute expanded presentation on their business, background, and appropriate referrals. New inductees will be slotted for their 10-minute commercial after 60 days, after exhibiting improved 60-second commercial presentation, generating referrals, inviting guests, and undertaking 1-on-1s.
- C. For in-person, the 10-minute speaker should arrive BEFORE 7:45 AM. They can distribute collateral, provide a special offer and display promotional items to keep top-of-mind awareness and shall provide breakfast for the group. In the case of an online meeting, the 10-minute speaker should be prepared to present or send their slideshow presentation 24 hours prior and log in before 7:45 AM to test their connectivity or to solve any other technical issues.
- D. Members are expected to generate weekly referrals, bring visitors (prospective members), conduct 1-on-1 meetings, and fill out Referral Slips or their digital equivalent based on their group reported practices. These reports must be sent to treasurer for the Chair to provide a quarterly report to Chamber liaison/President.
 - 1. Must provide at least a monthly average of one referral per week, which will be tracked.

Referral Groups

Policies

2. Must invite an average of one guest (that attends meeting) and have an average of two 1-on-1 meetings per month over a 6-month period.
 3. Referral slips or any reports sent via email or entered via internet must be filled out completely, accurately, legibly, and timely for tracking purposes, preferably prior to the weekly meeting.
- E. For in-person meetings, a card caddy containing the business cards of each member will be maintained by the Secretary/Attendance Leadership position. Member pages should be full. In the case of an online meeting, a digital roster with all members of the group shall be maintained as such.
1. The caddy/digital roster will be passed at each meeting for members and visitors. Visitors can take as many cards from the business caddy as they want but may not insert or add their cards/names into the caddy/digital roster until they become a member.
 2. Members are requested to fill their page with their business cards and/or send their information to be added to the digital roster.
- F. Members are required to participate in 1-on-1 meetings with other members offsite to learn more about each other and how they can better help each other with referrals and improving their business. **THESE ARE NOT SELLING MEETINGS!** One referral credit will be granted each party for the first 1-on-1 meeting with a particular member in zoom/in-person. Members should strive to have 1-on-1 meetings with the entire membership within the first 120 days of membership. They can re-visit subsequent 1-on-1 meetings as businesses develop, grow, change, or add goods and/or services so they stay updated. No additional referral credits are given for subsequent 1-on-1s. Fill out a referral slip or send it digitally indicating FIRST 1-on-1 meeting, when and with whom the meeting took place. 1-on-1 credit for referrals can be locally monitored by each Group with the approval of the President and Liaison.
- G. Chair and Leadership shall meet MINIMALLY once per month to review metrics (absences, referrals given/received, business closed, 1-on-1s done, guests attending, etc.) approve candidates, update each member of Leadership, identify underperforming members' metrics, suggest action plans, and take care of any housekeeping items.

Quarterly meetings will be scheduled by Referral group Chair, Chamber Liaison, and President. In the case that the Chair of the group, cannot make these quarterly meetings a

Referral Groups

Policies

member of the leadership board must attend as a substitute (i.e., Treasurer, Secretary, membership/recruitment, or mentor).

First quarter

10/23/24- Weston Innovative Networking Group and Weston Leaders

10/24/24 - Power Partners and Nexus

Second quarter review- (Chamber yearend)

1/22/25- Weston Innovative Networking Group and Weston Leaders

1/23/25- Power Partners and Nexus

Third quarter Review

4/24/25- Weston Innovative Networking Group and Weston Leaders

4/25/25 - Power Partners and Nexus

Chamber liaison will require all metrics for each quarter to be in by the week prior to these dates above the first Thursday or Friday of the new year's month.

Referral Groups

Policies

H. President and Liaison will review quarterly performance of all members. It is the Group Chair's responsibility to accurately report and send all referrals, guests and 1-on-1s quarterly to chamber liaison with copy to the President. Failure to report on time will incur a charge to the leads group account of \$50, a second time of \$100, and the third time is an immediate termination of the leads group.

V Guest Policy

- A. A guest may visit a maximum of 3 meetings after which they are expected to send an application to the group. As a non-member, they must apply to the Chamber and be accepted before their application for ANY Referral Group is considered. **If Guest's profession is taken in the Group visited, that guest may visit that group only ONCE.**
- B. Referral Group prospects may apply concurrently to both Chamber and their choice of Referral Group if opening is available. Leadership must expedite vetting application once application and payment is submitted to within 2 weeks' time. Applicants are strongly encouraged to continue to visit while their application is being processed by the Leadership Board. **Membership must verify applicant is in fact a paid active Chamber member before they begin actively participating in the Referral Group.**
- C. Members are REQUIRED to invite Guests to the Group to GROW the group. The goal size of every Group should be 40+ members. Guests do not have to be a Chamber Member but should be so excited by what they see that they WANT to join the Chamber to be in your group.

Referral Groups

Policies

VI Leadership Board. All leadership must attend Quarterly meetings with President and Liaison to discuss Referral Groups Policies and templates and to show their commitment to it. In the case that the chair cannot make the meeting, he/she must appoint a member of the leadership board to attend meeting.

A The following positions are mandatory leadership positions that must be filled in each group. Other Leadership positions are to be reviewed and implemented by the Chair only after these five positions have been filled. Also, these top five positions are recognized by the chamber and will have voting rights when taking decisions on referral groups. Leadership will have 2-year terms, newly aligned with the Chamber's fiscal year of July 1-June 30. Their responsibilities are as follows:

- 1 **Chair** - Leads meeting, holds to agenda's template and second follow-up to guests (after Membership) to ascertain interest level of Guests. Represents Group or delegates those that will be present to represent the group at Chamber functions, **MOTIVATES GROUP TO GROW!** Appointed by Chamber President and responsible for overseeing all other leadership roles of their group.
- 2 **Treasurer** - Tracks referrals and closed business, collects application, renewal fees and any other monies the group collects (e.g., Scholarship presentation at Goldstar Breakfast, Group event payment, etc.). Alerts Chair to underperforming members and potential participation problems.
- 3 **Secretary** - Communicates with Group, schedules 10-minute speaker rotation and tracks attendance. Alerts Leadership of any member getting close to 3 absences in a reasonably short period of time.
- 4 **Membership/Recruitment** - Seeks prospects and develops and implements programs to do so. First follow up, sends policies and applications to guests/prospects. Verifies applicants, checks references, follows up on guests within 48-72 hours.
- 5 **Mentor/Educator** - Educates Group on best business growth practices. Provides rehabilitative support/action plans to underperforming Group Members. Helps with onboarding, 10-minute presentation and member's commercials.

CHAIR will be appointed by President of Chamber and Liaison after interview and commitment to follow template for success. It is at the Chamber

Referral Groups

Policies

President's discretion that the Chamber removes a Chair, or the Chair continues his/her leadership position.

Treasurer and Mentor/Educator will be elected by General Membership in odd numbered years. Secretary and Membership/Recruitment positions shall be voted on by General Membership in even numbered years.

These Voting years will go into effect **in May 2025 for 2025-2026 fiscal year.**

- B. The following positions will have 1-year terms and be elected by the General Membership:
- 1 Visitor Host - Makes Guests feel at home at meetings. Introduces Guests to other Members, sells and encourages Guests on benefits of membership.
 - 2 Sergeant-at-Arms & Alternate - Announces meeting. Keeps order. May be involved in election vote counting and verification.
 - 3 Ethics and Conflicts Leader - Performs as mediator if any conflict arises as to referral performance and questions therein. Makes sure Group stays ethical on a business and personal level.
 - 4 Other Leadership positions may be added at Local Group level with majority vote of Leadership and approval of President and Liaison.
- C. Nominations/Volunteers are to be taken the last meeting in May.
- 1 Each nominee must accept or decline the nomination to Sergeant-at-Arms BEFORE the first meeting in June.
 - 2 Member can accept a nomination/volunteer for only one position on the Leadership board.
 - 3 Candidates may be permitted by the Chair to make a brief (1-minute) presentation of their qualifications to the membership at the second meeting in June. Time available will dictate this.
 - 4 Elections will be held the third meeting in June. Only those in attendance will be eligible to vote.
 - 5 Votes shall be counted by the Secretary and witnessed by Liaison or Chamber President. A formal announcement will be made the third meeting in June. A simple majority will win.
 - 6 Newly elected Leadership Team members shall observe their newly elected position the last meeting of June.

Referral Groups

Policies

- 7 Newly elected Leadership positions will assume their positions on the first meeting in July.

D. Requirements to serve on the Leadership board:

1. Must be a member of Group at least 6 months.
2. Must be in good standing (minimal absences, minimal tardiness, appropriate referrals given, appropriate number invited guests' attendance, Chamber dues) and a record of excellent participation.

VI Policy Revisions

A. Revisions to Policies for each local Group can be implemented by requiring the majority vote of the Leadership Board with a notice in advance and approval of President of Chamber and Liaison of Referral Groups.

B. Membership is encouraged to bring new ideas to the Board for consideration.

Referral Groups

Policies

XII Weekly Meeting Agenda

7:45 AM – Arrival and open networking

8:00 AM – Meeting called to order

a. Welcome Guests

b. Introduce Leadership Board

Stand and introduce yourselves by Name, Position, Profession

8:07 AM – Networking Tip (Mentor/Educator)

8:09 AM – Pass Business Card Caddy/sent digitally

8:10 AM – Induct new members

8:12 AM – Visitor Introductions - *Name/Business Name/Who invited them*

8:13 AM – Member Commercials

8:35 AM – 10 Minute Speaker rotation announced

8:36 AM – Referral and Financial reports

8:37 AM – 10 Minute Speaker—including Q and A

8:47 AM – Referrals and Testimonials

8:55 AM – Announcements

Please turn on your Cell Phones

9:00 AM – Close meeting

Referral Groups

Policies

APPENDIX 2

All new members must attend the Referral Group Orientation with the President prior to becoming a member of the leads group. Please use calendar link below:

<https://calendly.com/thechamber/leads-group-orientation>

Note: Member can proceed with booking an appointment with the President if the member has submitted the leads group application to the leads group representative and has been vote on. In addition to that the member has joined the Chamber the leads group belongs too.

Referral Groups

Policies

The following dates leads groups to cancel their meetings in fiscal year 2024.

Nexus and Power Partners

Second Tuesday of the month- strongly advised to attend the Monthly Chamber Breakfast to recruit, network for themselves and their group and invite guests to visit their groups

November 26, 2024

December 24, 2024

December 31, 2024

November 25, 2025

December 22, 2025

Weston Innovative Networking Group

Thursday, July 4, 2024

Thursday, November 28, 2024

Thursday, December 26, 2024

Thursday, January 2, 2025

Thursday, June 19, 2025

Thursday, November 27, 2025

Thursday, December 25, 2025

Weston Leaders

Friday, November 29, 2024

Friday, December 27, 2024

Friday, July 4, 2025

Friday, November 28, 2025

Friday, December 26, 2025

All other meeting dates must be kept unless authorized by the Chamber with a minimum of 8 weeks prior notification.

Referral Groups

Policies

MEMBER DECLARATION

Members and prospective members: Please insert PRINTED name where indicated, sign and date:

"I (print name) _____ have read and understand the policies of my Referral Group. I will abide by these policies to the best of my abilities.

Signature: _____ DATE _____

Please print name, sign and date Member Declaration and turn it in to Secretary for verification.